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NEWSPAPER

Advertising Age

August 10, 1992

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Advertising Age ORIGINAL SURVEY EXTRA

1 Has advertising had an influence on the U.S.' current racial problems?

6.1% Extremely influential
13.8% Very influential
36.4% Somewhat influential
22.2% Not very influential
18.9% Not at all influential
2.5% Don't know

2 Are there enough black people in print ads?

54.8% Too few
0.6% Too many
40.8% Right amount
3.8% Don't know

3 Are there enough black people in TV commercials?

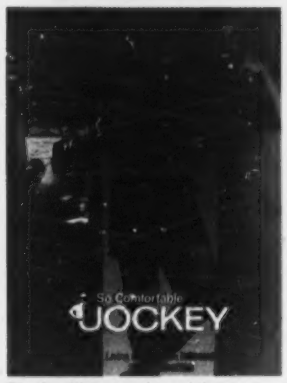
52.4% Too few
2.5% Too many
42.3% Right amount
2.8% Don't know

4 How many black people in non-clerical positions do you work with on a daily basis?

56.5% 0
16.8% 1
18.3% 2-4
5.7% 5-10
1.3% 11-20
1.5% More than 20

Source: *Advertising Age*

Samsonite Corp. and Leo Burnett USA "break all the taboos" with this ad, says Marilyn Kern-Foxworth, a professor who's writing a book on the history of blacks in advertising. The ad shows a black businesswoman talking to the white man seated beside her on a plane.



Black athletes and musicians aren't the only suitable role models that can be portrayed in advertising. This ad is part of a series that features prominent men in Jockey underwear. Here, the focus is on an agricultural economist.

What role do ads play in racial tension?

By Adrienne Ward

The fires of Los Angeles were still smoldering when ad industry leaders joined together to "Rebuild L.A." But an exclusive *Advertising Age* survey on racial issues in the marketing community has found the industry might want to get its own house in order first.

The survey of 470 marketing and media executives found more than half of all respondents believe advertising has played a role in the country's current racial problems: 19.9% of respondents said advertising has been extremely or very influential and 36.4% said it has been somewhat influential. Of the remaining respondents, 41.1% said not very or not at all influential and 2.5% answered don't know.

The random survey of *Ad Age* subscribers—representing the U.S. marketing universe—was conducted by telephone in June. The margin of error was plus or minus 3.9 percentage points.

The problem for many people begins with representation and even, some respondents say, stereotyping.

"All we ever see is a bunch of us dancing to a good beat and

(Continued on Page 35)

GE helps NBC score Olympic ad sellout

Net's parent took millions in unsold commercial time

By Joe Mandese

NEW YORK—NBC managed to sell all its ad time in the just-completed Summer Olympics, but not without a shove across the finish line from parent General Electric Co.

NBC appears to have crammed its coverage of the Games with far more commercials than GE's original Olympic ad deal called for.

"NBC had unsold time that they've just allocated to GE," said an executive at a competing network who closely monitored NBC's Olympic coverage. He estimated GE got about "three to four times" more spots than other advertisers with similar deals.

Reebok International, Xerox Corp. and PPG Industries had Olympic ad deals with NBC worth an estimated $10 million to $12 million, just about the same deal cut by GE two years ago.

But through Aug. 4, GE ran enough network commercials to make it one of the largest Olympic advertisers, with a package worth an estimated $23 million.

GE and NBC executives denied NBC provided free bonus units to the parent company to fill unsold Olympic time and maintained GE's increased

(Continued on Page 36)

Bush ad team slips up big in first TV commercials

By Steven W. Colford

WASHINGTON—The November Co.'s first TV spots for President Bush broke last week and almost broke the law at the same time.

In an embarrassing faux pas, the Bush-Quayle campaign had to withdraw the first versions of the much-anticipated 30- and 60-second commercials, slated to run until the Republican convention begins Aug. 17 in Houston.

Those spots, sent July 30 to Cable News Network and broadcast stations around the country, opened with the presidential seal. Federal law prohibits use of the seal in any fashion that suggests "sponsorship or approval." Violations are punishable by a fine of $250 and up to six months in jail.

So the campaign scrambled to retrieve the commercials, edited them to exclude the seal and sent them out again. While the edited spots ran in all the time slots bought by the campaign, the first versions appeared on CNN Aug. 3 during a news program about the commercials. *(See AdReview on Page 40.)*

The Bush-Quayle campaign initially said an audio problem forced the commercials' withdrawal. Later, the campaign directed inquiries to the No-

(Continued on Page 36)

LAST MINUTE NEWS

Tyco talking to agencies

MOUNT LAUREL, N.J.—Tyco Toys has contacted major agencies for a new-business pitch or possible review of its estimated $50 million to $60 million broadcast and print account, agency executives said. Tyco denied any review is under consideration. Bozell, New York, is currently Tyco's agency.

Judge blocks A-B anti-Coors ads

NEW YORK—U.S. District Judge John Martin on Friday temporarily enjoined Anheuser-Busch from running Natural Light TV and radio spots critical of Coors Light. The order came shortly after Coors filed a $10 million-plus suit here against Anheuser-Busch and agency D'Arcy Masius Benton & Bowles, St. Louis, claiming the spots contain "false" and "misleading" statements. The commercials and point-of-purchase materials in New York and Pennsylvania markets say that despite Coors Light's Rocky Mountain imagery, "concentrate" of the beer is shipped to the East where "local water" is added. Coors said it ships the denser version of Coors Light that comes from the brewery but denies removing anything to concentrate the product. The brewer said it merely adds water in the East instead of in Colorado. Anheuser-Busch officials had no immediate comment.

P&G results to show int'l growth

CINCINNATI—Procter & Gamble's fiscal results for the year ended June 30, to be re-

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Doug Goodman

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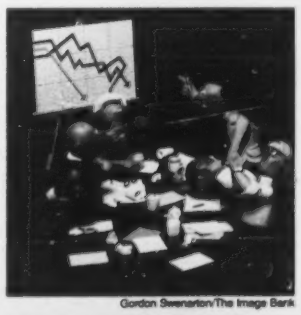
Mary Lou Retton writes an open letter to Olympic athletes about sponsorship deals. **Page 21.**

100 Media: Time Warner rises to top of rankings in a down year. **After Page 28.**



Gordon Swanson/The Image Bank

NEWS SUMMARY

■ **NBC** sold all its ad time in its Summer Olympics telecasts with help from parent General Electric. 1

■ **Racial problems** are influenced by advertising, a majority of marketing and media people said in response to a survey. . 1

■ **President Bush's** re-election ad team had to withdraw TV ads that used the presidential seal in violation of the law. 1

■ **Chrysler's** possible agency shake-up when Lee Iacocca leaves may be behind reports Ross Roy Group is looking for a buyer or merger partner. The agency says it's not for sale. 3

■ **General Mills** brings out Dunkaroos bite-size cookies. 3

■ **Electrasol Ultra** is being introduced as the first concentrated automatic dishwasher detergent in the U.S. 3

■ **GTE** ended its test of a supermarket frequent-shopper program, but it may return in a different form. 4

■ **Honda** has begun an introductory ad campaign for the Civic del Sol, its first convertible. 4

■ **Taco Bell** is selling hamburgers in a company-owned restaurant in Mesa, Ariz. 4

■ **Procter & Gamble** is moving aggressively forward with marketing plans for its calcium technology. 4

■ **RadioGuide,** which provides radio listings by format for long-distance auto travelers, will produce more than 5 million copies in this, its 20th, year. 12

■ **Bob Coen,** whose ad volume predictions for McCann-Erickson are widely quoted, tells the perils of forecasting. 16

■ **'Los Angeles Times'** plans a weekly inner-city neighborhood section starting in September. 26

■ **Gannett's** live in-flight news broadcasts, *USA Today* Sky Radio, are expected to begin this month on Delta Air Lines and United Airlines flights. 26

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NRA uses negative ads to hit more politicians

By Steven W. Colford

WASHINGTON—The National Rifle Association is flexing its political advertising muscle again, targeting a longtime congressional incumbent with a campaign that attacks his record on flag-burning, not gun control.

The NRA's latest target is Rep. Mike Synar (D., Okla.), characterized by the group as out of step with his fellow Oklahoma representatives on a variety of issues.

Rep. Synar, known to the advertising community for his opposition to tobacco ads, also happens to be on the NRA's list of gun-control supporters. That makes him a viable target for the NRA's new ad strategy of targeting anti-gun congressmen for their positions on issues unrelated to guns.

In a 30-second TV spot that broke Aug. 7 in Tulsa, the NRA blasted Rep. Synar for having voted against a constitutional amendment prohibiting the burning of the U.S. flag.

Rep. Synar faces stiff opposition in the Aug. 25 Democratic primary from Drew Edmondson, the son of a former congressman.

The NRA used the same back-door strategy in May to help defeat Rep. Beryl Anthony Jr. (D., Ark.). In a series of TV, radio and print ads, the NRA ripped into Rep. Anthony for bouncing checks and excessive travel. Rep. Anthony supported legislation requiring a seven-day wait after buying a gun.

The NRA plans similar ad campaigns against more than 20 other U.S. representatives from both parties.

The group is prepared to spend as much as it can raise to defeat NRA foes, said James Jay Baker, executive director of the NRA-Institute for Legislative Action, the gun lobby's legislative and political operation.

"Usually, in a general election cycle we will spend a couple of million in non-political action committee funds and a couple of million in PAC funds as well," Mr. Baker said. "We're also going to be involved in hundreds of state and local races as well."

The NRA's tactic could be used by other groups wanting to make an oblique attack on political enemies, Mr. Baker said.

"I think it's highly probable that other groups will adopt the same tactic" of going after an opponent with ads unrelated to the real issue at hand, he said. "No one has a lock on this idea. And they've been highly successful." □

P&G's 'super' move

Dumping 25% of stock keeping units; 'bone' to retailers?

By Bradley Johnson and Jennifer Lawrence

Procter & Gamble Co.'s plan to drop slow-selling varieties of brands representing up to 25% of its product line should improve the marketer's relations with supermarkets.

P&G is reviewing its least productive sizes, colors and flavors, and the company over the next 18 months could stop selling 15% to 25% of stock keeping units, or individual items. No brand would be completely eliminated.

"It's a tremendous leadership step for P&G to be taking, something that's needed to be done for a long time," said Christie Hunt, associate with Willard Bishop Consulting, a supermarket industry consultancy.

But P&G may have other motives as well.

The company is cleaning up its product roster following a period of aggressive acquisitions and product introductions. P&G added more stock keeping units in the past year than at any time in its history.

Also, the elimination of slow-selling products meshes with P&G's move away from trade price promotions and toward value pricing, in which the marketer charges a lower everyday wholesale price and eliminates periodic wholesale price cuts.

That move to everyday low pricing has angered some supermarkets. A source close to Unilever said: "P&G is throwing a bone to retailers who are pissed off with EDLP and who have been threatening to pull flankers and SKUs that are not doing very well."

For those chains that carry most or all of P&G's line, often part of a strategy of having the best selection in town, the P&G cutbacks could free up shelf space, Ms. Hunt said. But she said P&G could convince retailers to fill up that space with faster-selling versions of its brands.

Michael Rourke, VP-communications and corporate affairs at the Great Atlantic & Pacific Tea Co., said of the stock keeping unit eliminations: "If they were slow-moving items for us, we would cut them out anyway, and we probably already have." □

Say goodbye to Mr. Whipple; say hello to Charmin-Land

By Jennifer Lawrence

Mr. Whipple, watch out.

Procter & Gamble Co. is making squeezable pleasable in a new network TV campaign for Charmin bathroom tissue.

Three commercials, two 30-second and one 45-second, use animation to introduce viewers to Charmin-Land, the place where cartoon babies make the product squeezably soft. The ads use the theme "Charmin's so pleasable because it's so squeezable."

P&G hopes the babies will take over where Mr. Whipple left off. For 21 years, Mr. Whipple implored shoppers, "Please don't squeeze the Charmin"—though he was a major squeeze culprit. The campaign went off the air in 1985, and the company has been experimenting with creative approaches since then.

After a trip to the Charmin plant, agency executives from D'Arcy Masius Benton & Bowles, New York, came up with the idea of Charmin-Land to show how the product is made.

Animated babies are shown in the factory in all three spots. The :45 introduces Charmin-Land, while the other two spots focus on Charmin Plus and Charmin Potpourri tissues.

"We were looking for a refreshing way to talk about Charmin and squeezable softness," said a P&G spokeswoman. "With animation, we can talk about squeezable softness in a unique way."

Adios, Mr. Whipple: Babies now squeeze Charmin.

But Jack Trout, president of marketing consultancy Trout & Ries, thinks animation isn't the right way to go.

"I'd bring back a new generation of Mr. Whipple," Mr. Trout said. "Get Mr. Whipple's son or nephew . . . my feeling is animation is good for the youth market but not for grown-ups." □

Coen's crystal ball

Ad industry forecaster proud of his predictions, despite recent slips

By Gary Levin

NEW YORK—He's the guru of the ad forecasting business and has been since 1950.

Twice a year, his predictions are wildly anticipated and widely quoted.

And his reading of the relative health of the industry is an influential barometer of shifts in media pricing, advertiser activity and by extension, agency fortunes.

But is he accurate?

Robert J. Coen, senior VP-director of forecasting at McCann-Erickson Worldwide, readily admits he's slipped recently.

"Over 30-odd years, my track record has been pretty good," he said. But "the last few years have not been great, and probably the last two years have been most disappointing."

"The combination of the economic slowdown and the war just disrupted everything. They blew all my forecasts to smithereens."

An analysis of Mr. Coen's December forecasts for the coming year, and his own estimate of actual results a year or more later, show increasing discrepancies since 1988 *(see chart)*.

Although usually on target in periods of economic growth, Mr. Coen, 68, has lately tended to be overly optimistic about U.S. ad spending.

He initially thought 1990 spending would grow 6.2% but later said it gained just 3.8%.

In December 1990, he predicted spending would rise 4.6% during 1991; in the final tally, he reported it fell 1.7%, the biggest decline since 1942 and the first since 1961.

Last December, he predicted domestic ad spending in 1992 would grow 6.2%. But in June, he revised the forecast to 5% growth, based on evidence of a slower-than-expected economic recovery.

Agency and industry executives say they value Mr. Coen's projections to monitor sea changes but don't rely too heavily on the numbers for financial planning purposes.

"I use his historical data a lot, and I use his projections as provocations," said Alan Gottesman, an analyst at PaineWebber.

"It's sort of a game where you give more credit for the right questions than for the right answers," Mr. Gottesman said. "If I'm right or he's right, it's not important. Calling the directional change is the key, and the rest of it is details."

"The last few years have not been great, and probably the last two years have been most disappointing."

Others are sympathetic to the risks in recessionary forecasting.

"The trickiest parts are the turning points," said Victor Zarnowitz, a professor emeritus of economics and finance at the University of Chicago's Graduate School of Business. "Particularly in a downturn, this is frequently a major source of errors indeed. He has plenty of company."

Mr. Coen has had his share of challengers, but none have matched his longevity or consistency.

J. Walter Thompson Co. was among the few other early forecasters. Lately, investment banker Veronis, Suhler & Associates, Myers Marketing & Research, Data Resources Inc. and Saatchi & Saatchi Co.'s Zenith Media have begun issuing their own forecasts, but even some of them are based partly on Mr. Coen's own research.

The McCann ad forecasts started with a seminal tome, "Economic Effects of Advertising," by Harvard Business School Professor Neil Borden.

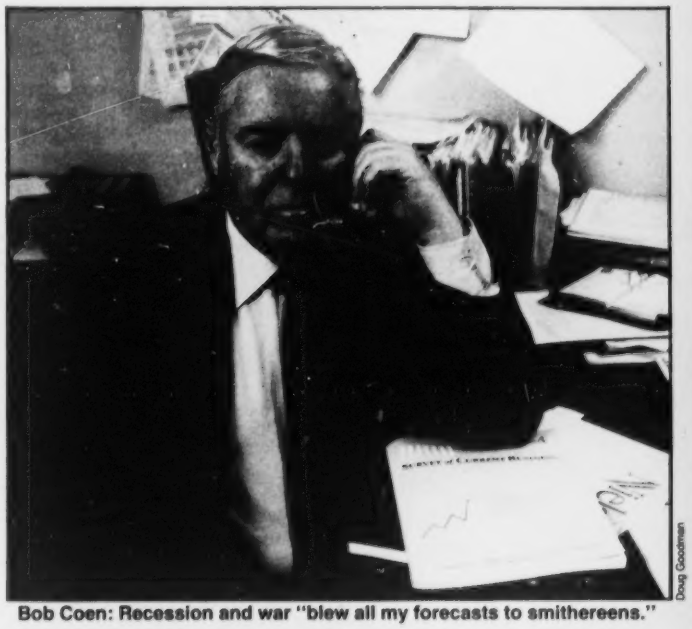
Anna Erickson, the widow of McCann founder Alfred Erickson, supplied a grant and some of McCann's research for the book, published in 1942.

The agency was thus "sucked into being the collector and custodian of this data," Mr. Coen said.

Subsequent forecasts based on data from L.D.H. Weld, then the agency's research director, were reported annually as an advertising study in *Printer's Ink*.

Mr. Weld was succeeded upon his retirement in 1948 by Hans Zeisel, a sociologist and lawyer, who was joined the same year by a "helper" named Bob Coen.

After a hitch in the Navy during World War II, Mr. Coen majored in economics at Holy Cross College, then received a master's degree in mathematics at Columbia University. While there, he was recruited by newly installed McCann President Marion Harper—later the founder of Interpublic Group of Cos.—who hired him as a research analyst and statistician.



Doug Goodman

Bob Coen: Recession and war "blew all my forecasts to smithereens."

Until that time, most agency researchers did little more than copy testing and other measurements to make sure their ads persuaded consumers to buy.

But Mr. Harper wanted to give McCann a competitive edge, so he asked Mr. Coen to produce ratings projections in the nascent days of TV, and to predict price changes for all media.

Two years later, Mr. Coen replaced Mr. Zeisel as the agency's chief forecaster and continued the yearly forecasts.

In 1964, Mr. Harper shifted Mr. Coen to Interpublic, where he directed the Applied Science Division, whose lofty, then-daring and expensive goal was the use of a computer model to predict the likelihood that a panel of 2,000 households would watch a certain program or read a particular magazine.

"It cost a lot of money and probably helped put the skids under poor Marion Harper," Mr. Coen recalled, referring to the ouster of the free-spending Interpublic founder in 1967.

The forecaster then returned to McCann. In 1970, he began producing overseas spending forecasts, and in 1979 was named to his current post of senior VP.

Mr. Coen's methods are part scientific numbers-crunching, part artful conjecture.

He uses historical data to track the likely effect of growth in the gross national product on ad spending, estimating how far one lags behind the other. And he takes stock of significant events, like deregulation of airlines and utilities, that spur advertising activity in a major category.

But he also uses an extensive network of contacts to work from the ground up. Interviews with McCann clients, the agency's own media staffers, media sales reps and others provide information on advertiser demand and pricing.

"It's a guessing game," Mr. Coen said. "You're creating hypotheses and testing them out quantitatively, then watching them and continually revising them."

The benefits of his activity at McCann are twofold.

"There's a great internal benefit of not working in a black box, knowing what's going on out there," he said. "It helps to communicate with the media department and our own clients . . . We can say [to clients], 'Hold back, it's a weak market and it's going to collapse.' "

There's also the public relations value. The forecasts, touted in news conferences and meetings with securities analysts, "get tremendous coverage, and the name McCann-Erickson is well known."

He proudly pointed out that his midyear update figures are published worldwide in newspapers with a combined circulation of 15 million to 20 million, and the agency's foreign offices distribute hundreds of copies.

"It's sort of a game where you give more credit for the right questions than for the right answers."

Mr. Coen's final estimates of previous years' advertising volume are widely accepted and have been used as "official" by U.S. government agencies.

Although Mr. Coen said he has no immediate plans to retire, he believes that if he did, McCann has the resources to carry on his work. But there's no obvious successor at the agency, and other shops might jockey to fill the void if McCann didn't.

Mr. Coen seems to worry about whether anyone who takes his place will win the credibility he's built up.

"I hate to see all the historical experience get lost down the drain." □

Coen: How's he doing?

Year	Forecast*	Actual
1974	5.0	6.6
1975	6.1	4.8
1976	9.7	19.4
1977	10.6	12.4
1978	10.9	15.7
1979	11.0	12.6
1980	11.0	9.8
1981	10.8	12.8
1982	11.7	10.2
1983	9.2	13.9
1984	13.8	15.8
1985	9.7	7.9
1986	8.0	7.7
1987	7.6	7.4
1988	9.0	7.9
1989	6.1	5.0
1990	6.2	3.8
1991	4.6	−1.7
1992	6.2	—

*Made in prior December. Source: McCann-Erickson Worldwide and *Advertising Age*

Statistics prof calls Coen's ad forecasts 'a mixed bag'

By Dennis Chase

Forecaster Robert J. Coen gets a mixed grade from the statistics profession.

Advertising Age asked Peter Rossi, associate professor of econometrics and statistics at the University of Chicago's Graduate School of Business, to analyze Mr. Coen's forecasts for the past 18 years.

Mr. Rossi looked at two sets of numbers: Mr. Coen's forecasts of the coming year's growth and how fast spending actually grew. He ignored forecast revisions that Mr. Coen, McCann-Erickson Worldwide senior VP-director of forecasting, makes throughout the year.

The professor used a "root mean square error" measure to find the average size of Mr. Coen's errors. This measure does not gauge whether Mr. Coen overestimates or undershoots the actual percentage of ad spending growth. Instead, it looks at the absolute size of the error: The larger the number, the worse the forecast.

Mr. Coen's average mean-squared error during the 1974-91 period was roughly 3.4%, which Mr. Rossi called "rather large" relative to ad spending growth.

The good news is that Mr. Coen does better than simply guessing how fast ad spending will grow based on how it changed in the previous year—a common technique Mr. Rossi called the "simple, naive rule."

Guessing that ad spending would grow by the same percentage in one year as it grew the previous year yields a root mean square error of 5%, and "Coen beats that," Mr. Rossi said. "If you can't beat that, you shouldn't be forecasting."

Asked to assess Mr. Coen's performance overall, he said: "It's a mixed bag." □

● NEW YORK ● LOS ANGELES ● CHICAGO ● PHILADELPHIA ● SAN FRANCISCO/OAKLAND/SAN JOSE
● BOSTON ● WASHINGTON, DC. ● DALLAS/FORT WORTH ● DETROIT ● HOUSTON ● ATLANTA
● CLEVELAND ● SEATTLE/TACOMA ● TAMPA/ST. PETERSBURG/SARASOTA ● MINNEAPOLIS/ST. PAUL
● MIAMI/FORT LAUDERDALE ● PITTSBURGH ● ST. LOUIS ● SACRAMENTO/STOCKTON/MODESTO ● PHOENIX

Spotlight on the Top 20

With the U.S. population increasingly concentrated in metropolitan markets, this special advertising section focuses on the biggest of them all: the Top 20 markets.

The markets on the A.C. Nielsen Co. Data Profile pages that follow are the 20 largest Nielsen Designated Market Areas: markets whose boundaries are defined by TV viewing habits and ranked in size by the number of TV households they contain rather than their population. (With a few exceptions, the Top 20 DMA population ranking corresponds to the DMA TV households ranking.)

The Top 20 markets can vary greatly in geographical size. They represent the nation's largest urban/suburban marketplaces, yet where there are no nearby TV markets they sprawl across portions of rural and small-town America, too. For marketers, they are a common building block for marketing and media plans. Hence, their use in this section.

These Top 20 markets accounted for 44.4% of all U.S. TV households in January 1992, according to A.C. Nielsen Co.-published estimates. Within them live 113.2 million people, or 44.7% of the U.S. population, Nielsen reported.

By comparison, the next 20 Nielsen DMAs represented 16.6% of U.S. TV homes and 41.3 million people.

They represent the nation's largest urban/suburban marketplaces, yet they can sprawl across portions of rural and small-town America, too.

Most regions of the country are represented on the Top 20 list: five of the Top 20 are in the East, three in the South, five in the Midwest, two in the Southwest and five in the West.

The specific market data profiles in this section rely on information made available by Nielsen and Donnelley Marketing Information Services (DMIS), a division of Nielsen Marketing Research. The exception is unemployment and retail sales data, provided by the U.S. Labor and Commerce departments.

All the data are based on the Nielsen DMA market definition, with the exception of unemployment and retail sales figures, which are based on U.S. Census Bureau market definitions (Consolidated Metropolitan Statistical Areas and Metropolitan Statistical Areas) that are similar to but often smaller in geographical area than the Nielsen DMA definition.

Each Data Profile page includes the following categories of information:

Total DMA TV households
Total DMA population
Age 2+ population
Adult population
Men 18+ population
Women 18+ population
Population by race (white, Hispanic, nonwhite and black)

Total households
Owner-occupied households
Renter-occupied households
Households by family size
Households with infants/preschoolers
Households by age of head of household
Households by disposable income category
Households by car availability

The data for these sections of each profile were provided to Nielsen by Market Statistics. TV household estimates were derived by Nielsen from total household data provided by Market Statistics. Data are based on the 1990 census and updated to January 1992.

Each category of data is benchmarked against a national index of 100. An index of 150 means a category in that DMA is 50% over the national average; an index of 80 means a category is 20% below the national average.

For example, the Los Angeles DMA has an age 2+ Hispanic population of 4.8 million. The index applied to the population segment, 364, indicates this Top 20 market has more than triple the national average of Hispanics age 2+.

Major retail outlets in 1991

Each Data Profile page also identifies the largest retailers by number of stores in the DMA in 1991, in the areas of supermarkets, major discount department stores and major drug/health & beauty aids stores. Data were provided to Nielsen by Progressive Grocer Trade Dimensions and Chain Store Guide Information Services.

ClusterPLUS™ demographics and lifestyles

From Donnelley Marketing Information Services, the lifestyle and demographic segments listed for each Top 20 market represent the largest segments in the market as ranked by percentage of total DMA households. Each segment is benchmarked against a national index of 100. For example, 4.7% of households in the Boston DMA are classed in the ClusterPLUS™ category "established affluent," with an index of 220, or more than twice the proportion of such households in the nation as a whole.

Each of the 47 ClusterPLUS™ categories represents a distinct lifestyle. DMIS ranks each segment using its proprietary Socio-Economic Status Indicator (SESI) from No. 1, the highest, to No. 47, the lowest.

The 20 ClusterPLUS™ categories with the highest SESI ratings are:

Nos. 1 through 5—established wealthy; mobile wealthy with children; young affluents with children; suburban families with teens; established affluents.

Nos. 6 through 10—highly mobile young families; affluent urban singles; older mobile well-educated; non-urban working families; young professionals.

Nos. 11 through 15—small-town families; highly mobile working couples; older small-town households; urban retirees and professionals; older non-mobile urban households.

Nos. 16 through 20—urban working families; young urban educated singles; working couples with children; young ex-urban families; group quarters.

Median household income
Aggregate household income
Median family income
Most affluent counties (by median household income)
Household income distribution
Average household net worth
Age distribution
Median age
Median age adult population
County population growth forecasts

These data are supplied from DMIS.

Retail sales
Unemployment trends

Labor department unemployment data are for April 1992, the latest metro area data available at press time, and are not seasonally adjusted. For comparison, of 271 metro areas for which April unemployment data were available, 60 areas reported rates higher than 8.5% and 50 reported rates below 5%.■

The markets and ranks

#11 **Atlanta** M-17
#6 **Boston** M-10
#3 **Chicago** M-7
#12 **Cleveland** M-18
#8 **Dallas/Fort Worth** M-12
#9 **Detroit** M-14
#10 **Houston** M-16
#2 **Los Angeles** M-6
#16 **Miami/Fort Lauderdale** M-26
#15 **Minneapolis/St. Paul** M-24
#1 **New York** M-4
#4 **Philadelphia** M-8
#20 **Phoenix** M-31
#17 **Pittsburgh** M-28
#19 **Sacramento/Stockton/Modesto** M-30
#18 **St. Louis** M-29
#5 **San Francisco/Oakland/San Jose** M-9
#13 **Seattle/Tacoma** M-20
#14 **Tampa/St. Petersburg/Sarasota** M-22
#7 **Washington, D.C.** M-11

About this supplement

The Top 20 Markets special advertising section was edited and produced by the *Advertising Age* Special Projects Department: Director, Richard L. Gordon; Design, Jill D'Angelo; Cover illustration, Kevin Fegan, Crain InfoGraphics, New York; Maps, Crain InfoGraphics, Chicago.

#1 New York

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 1

		% U.S.
DMA TV HHs	6,723,980	7.305
DMA population	18,761,900	7.410

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	18,202.5	100	7.43	100
Total adults	14,396.6	100	7.67	100
Men (18+)	6,741.9	47	7.50	98
Women (18+)	7,654.7	53	7.82	102

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	13,546.6	74	6.61	89
Hispanic	2,829.7	16	12.48	168
Non-White	4,655.9	26	11.56	156
Black	3,592.3	20	11.95	161

DMA households

	(000)	%DMA	%U.S.	Index
Total	6,845.2	100	7.31	100
Owner-occupied	3,545.4	52	5.90	81
Rented	3,299.8	48	9.83	135

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	1,801.9	26	7.84	107
2 members	1,983.1	29	6.61	90
3 members	1,185.4	17	7.29	100
4 members	1,030.7	15	7.30	100
5 members	493.8	7	7.84	107
6+ members	350.3	5	8.85	121

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	1,133.0	17	6.87	94

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	1,580.0	23	6.22	85
35-54	2,709.8	40	7.67	105
55+	2,555.4	37	7.77	106

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	356.5	5	6.02	82
$5,000-9,999	540.1	8	6.42	88
$10,000-14,999	530.3	8	5.95	81
$15,000-19,999	505.5	7	5.72	78
$20,000-24,999	483.8	7	5.87	80
$25,000+	4,429.0	65	8.31	114

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	2,358.8	34	7.11	97
Two or more	2,336.7	34	4.75	65
No car	2,149.7	31	19.02	260

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

A & P Tea Co.	345
Grand Union	124
Supermarkets General Corp.	103
King Kullen Grocery	50
Red Apple Supermarkets	50

Major discount department stores

Caldor	54
Marshalls	39
Kmart Stores	38
Bradlees	30

Major drug, health & beauty aids stores

Rite Aid Corp.	210
Pathmark Drug Stores	133
Melville Corp.X	121
Genovese Drug Stores	94
Hook-SuperX	51
Walgreen Co.	42

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

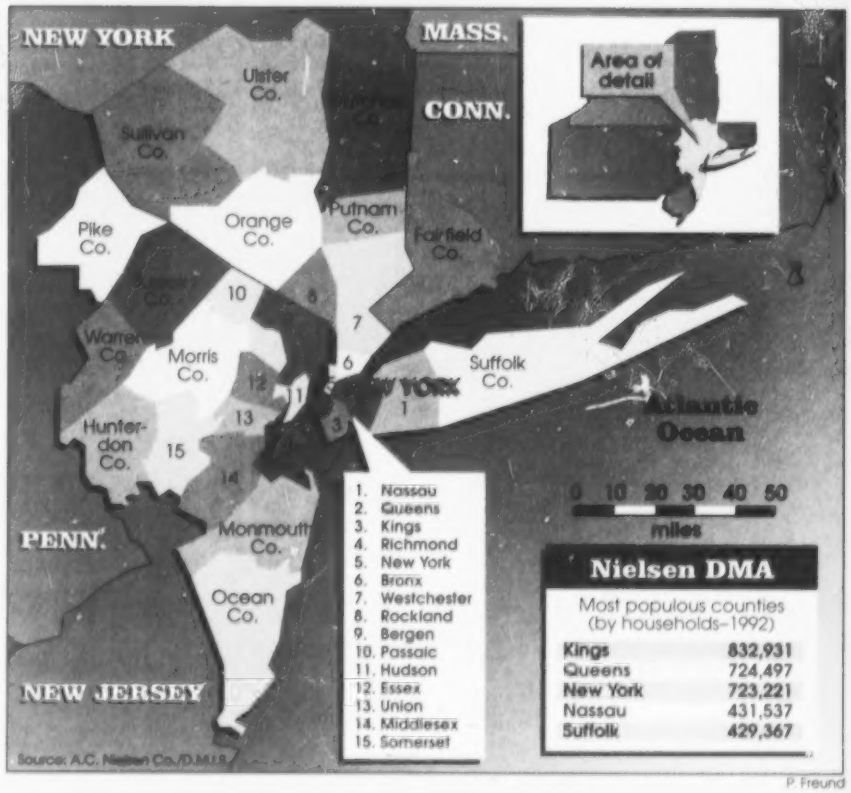
	% of HHs	Index
Old urban ethnics	14.5	664
Center city blacks	9.3	673
Affluent urban singles	7.7	320
Urban retirees & professionals	5.7	313
Lowest income Hispanics	5.3	267
Older non-mobile urban HHs	5.2	203
Urban working families	4.9	203
Suburban families w/teens	4.7	212
Lowest income urban retirees	4.5	347
Established affluents	4.0	188
Established wealthy	3.4	294

DMA household income (1991)

Median HH income	$36,995
Aggregate HH income	$348.07 billion
Median family income	$47,398

Most affluent counties
(by 1991 median HH income)

1. Somerset (N.J.)	$59,704
2. Morris (N.J.)	$58,936
3. Hunterdon (N.J.)	$55,743
4. Nassau (N.Y.)	$54,897
5. Rockland (N.Y.)	$52,593



P. Freund

DMA HH income distribution (1991)

$0-7,499	7.9%
$7,500-9,999	5.6%
$10,000-14,999	7.9%
$15,000-24,999	13.9%
$25,000-34,999	12.6%
$35,000-49,999	16.0%
$50,000-74,999	17.6%
$75,000+	18.5%

Average HH net worth $263,678
Regional index 115.7
National index 133.3

DMA age distribution 1992

0-5	7.9%
6-13	9.9%
14-17	5.0%
18-24	9.7%
25-34	17.0%
35-44	15.7%
45-54	11.7%
55-64	9.2%
65+	13.5%
Median age	35.14
Median age adult population	42.32

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Ocean (N.J.)	+39,689
2. Kings (N.Y.)	+39,150
3. Middlesex (N.J.)	+31,740
4. Queens (N.Y.)	+26,261
5. Bronx (N.Y.)	+24,774

Retail sales*
New York-Northern N.J.-Long Island CMSA
1991 $135.105 billion
Change from 1990 −1.6%

1992/1991 retail sales trend
April 1992 $10.915 billion, −0.9%
Jan.-April 1992 +0.1%
*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 4.9% in the Stamford (Conn.) Primary MSA to 10.5% in the Jersey City PMSA. In the New York PMSA, the rate was 8.8%. Source: U.S. Labor Department

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Advertising Age
WHERE NEW YORK GETS THE WORD
On Marketing

#2 Los Angeles

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 2

		% U.S.
DMA TV HHs	4,875,100	5.297
DMA population	14,873,300	5.874

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	14,321.1	100	5.84	100
Total adults	10,865.2	100	5.79	100
Men (18+)	5,383.6	50	5.99	103
Women (18+)	5,481.6	50	5.60	97

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	11,401.8	80	5.57	95
Hispanic	4,821.0	34	21.26	364
Non-White	2,919.3	20	7.25	124
Black	1,284.0	9	4.27	73

DMA households

	(000)	%DMA	%U.S.	Index
Total	4,976.2	100	5.31	100
Owner-occupied	2,676.7	54	4.46	84
Rented	2299.5	46	6.85	129

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	1,143.9	23	4.98	94
2 members	1,456.9	29	4.85	91
3 members	820.1	16	5.04	95
4 members	734.2	15	5.20	98
5 members	394.7	8	6.27	118
6+ members	426.5	9	10.78	203

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	1,067.2	21	6.47	122

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	1,482.9	30	5.84	110
35-54	1,992.6	40	5.64	106
55+	1,500.6	30	4.56	86

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	240.1	5	4.05	76
$5,000-9,999	335.9	7	3.99	75
$10,000-14,999	380.9	8	4.28	80
$15,000-19,999	400.0	8	4.53	85
$20,000-24,999	386.4	8	4.69	88
$25,000+	3,233.0	65	6.06	114

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	1,812.3	36	5.46	103
Two or more	2,672.6	54	5.44	102
No car	491.3	10	4.35	82

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Alpha Beta	304
Vons	217
Ralph's Grocery	127
Stater Bros. Markets	104
Albertson's	82

Major discount department stores

Kmart	72
Target	59
Marshalls	26
Pace Membership Warehouse	16

Major drug, health & beauty aids stores

Thrifty Corp.	319
American Drug Stores	140
Melville Corp.	74
Medicine Shoppe International	53
Longs Drug Stores	40
Pay Less Drug Stores	35

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

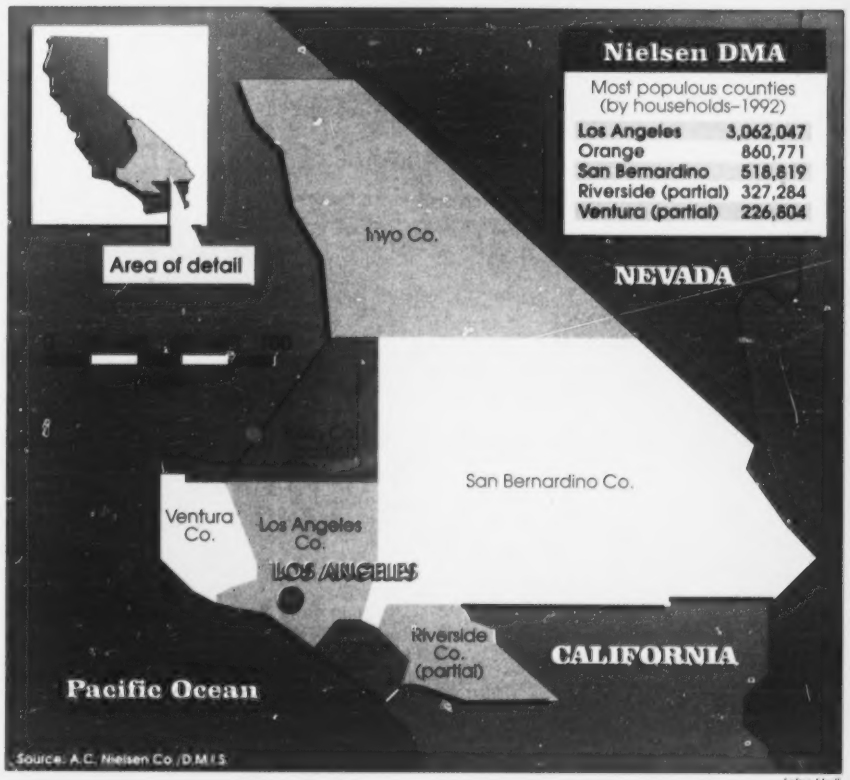
	% of HHs	Index
Young urban ethnics	9.9	385
Middle income Hispanics	9.6	587
Highly mobile working couples	8.1	113
Lowest income Hispanics	7.1	359
Affluent urban singles	6.9	286
Young urban educated singles	5.7	200
Urban working families	5.2	218
Avg income familes in SFDUs	4.5	145
Mobile wealthy w/children	4.3	336
Established wealthy	3.1	264

DMA household income (1991)

Median HH income	$35,200
Aggregate HH income	$234.50 billion
Median family income	$44,060

Most affluent counties
(by 1991 median HH income)

1. Orange	$42,392
2. Ventura	$40,841
3. Los Angeles	$33,786
4. San Bernardino	$33,693
5. Riverside	$31,613



John Hall

DMA HH income distribution (1991)

$0-7,499	7.8%
$7,500-9,999	4.9%
$10,000-14,999	7.8%
$15,000-24,999	15.3%
$25,000-34,999	14.0%
$35,000-49,999	17.8%
$50,000-74,999	17.2%
$75,000+	15.2%

Average HH net worth	$359,702
Regional index	132.7
National index	181.9

DMA age distribution 1992

0-5	9.7%
6-13	11.5%
14-17	5.5%
18-24	11.1%
25-34	18.7%
35-44	15.6%
45-54	10.2%
55-64	7.3%
65+	9.9%
Median age	31.36
Median age adult population	38.89

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Los Angeles	+733,615
2. San Bernardino	+385,479
3. Riverside	+248,102
4. Orange	+245,890
5. Ventura	+71,297

Retail sales*

Los Angeles-Anaheim-Riverside CMSA 1991	$118.177 billion
Change from 1990	−2.7%

1992/1991 retail sales trend

April 1992	$9.470 billion, −2.7%
Jan.-April 1992	−0.5%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 5.7% in the Anaheim-Santa Ana Primary MSA to 10.3% in the Riverside-San Bernardino PMSA. In the Los Angeles-Long Beach PMSA, the rate was 7.1%.
Source: U.S. Labor Department

• 86% SHOPPED IN A DEPARTMENT OR DISCOUNT STORE
• 78% SHOPPED FOR SHOES
• 59% SHOPPED FOR MEN'S CLOTHING
• 53% SHOPPED FOR WOMEN'S CLOTHING
• 48% SHOPPED FOR CHILDREN'S CLOTHING

•SOURCE: CLARK, MARTIRE & BARTOLOMEO 1991 STUDY "LAST MONTH"

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• 41% SHOPPED FOR ELECTRONICS
• 39% SHOPPED FOR AUTOMOTIVE AFTERMARKET
• 37% SHOPPED FOR HOME IMPROVEMENT
• 50% FREQUENTLY SWITCH BRANDS

FOR MORE INFORMATION ON LA OPINION'S READERS, PLEASE CONTACT THE MARKETING DEPARTMENT AT (213) 896-2020

#3 Chicago

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 3

		% U.S.
DMA TV HHs	3,016,930	3.278
DMA population	8,498,000	3.356

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	8,214.1	100	3.35	100
Total adults	6,258.7	100	3.33	100
Men (18+)	2,985.4	48	3.32	100
Women (18+)	3,273.3	52	3.34	100

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	6,370.5	78	3.11	93
Hispanic	903.1	11	3.98	119
Non-White	1,843.6	22	4.58	137
Black	1,536.9	19	5.11	153

DMA households

	(000)	%DMA	%U.S.	Index
Total	3,059.2	100	3.27	100
Owner-occupied	1,909.0	62	3.18	97
Rented	1,150.2	38	3.43	105

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	772.4	25	3.36	103
2 members	892.3	29	2.97	91
3 members	519.7	17	3.19	98
4 members	471.2	15	3.34	102
5 members	236.1	8	3.75	115
6+ members	167.5	5	4.23	130

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	556.7	18	3.38	103

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	824.1	27	3.25	99
35-54	1,197.3	39	3.39	104
55+	1,037.8	34	3.16	97

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	175.5	6	2.96	91
$5,000-9,999	228.8	7	2.72	83
$10,000-14,999	220.5	7	2.48	76
$15,000-19,999	229.1	7	2.59	79
$20,000-24,999	228.5	7	2.77	85
$25,000+	1976.8	65	3.71	113

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	1,177.1	38	3.55	109
Two or more	1,344.7	44	2.74	84
No car	537.4	18	4.75	145

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Jewel Food Stores	189
Dominick's Finer Foods	98
Eagle Food Centers	48
Aldi Inc.	31
Butera Finer Foods	17

Major discount department stores

Kmart	71
Venture Stores	36
Wal-Mart Stores	32
Marshalls	22

Major drug, health & beauty aids stores

Walgreen Co.	243
American Drug Stores	157
Hook-SuperX	59
F&M Distributors	24
Perry Drug Stores	21
Phar-Mor	18

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

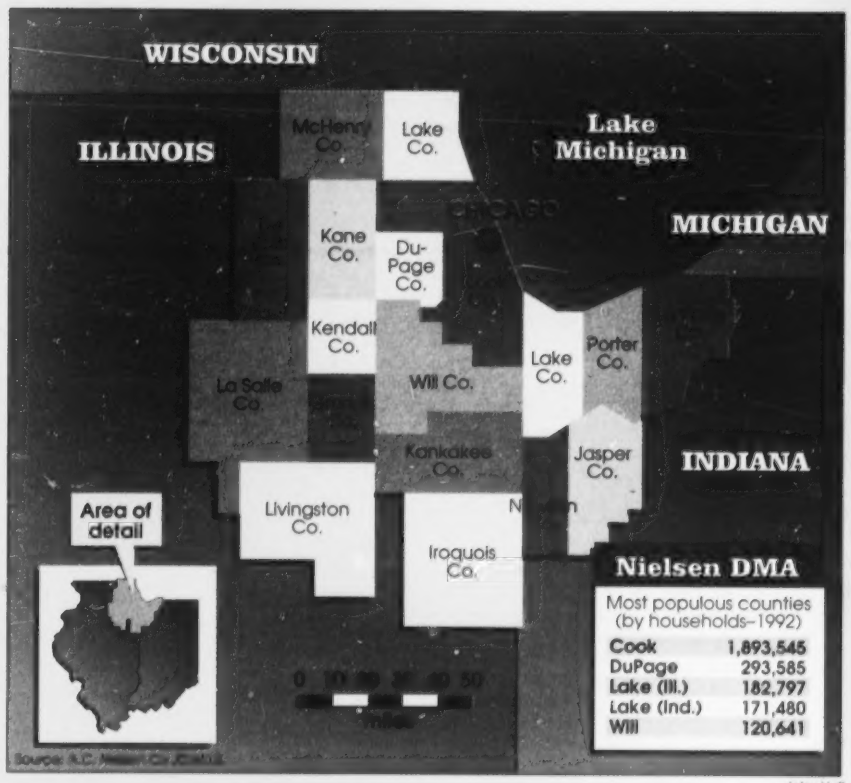
	% of HHs	Index
Old urban ethnics	10.3	472
Affluent urban singles	5.3	222
Urban working families	4.8	200
Highly mobile working couples	4.7	66
Older small town HHs	4.6	202
Young affluents w/kids	4.1	147
Lowest income black female hd HHs	4.0	302
Established affluents	3.9	182
Older non-mobile urban HHs	3.6	141
Small town families	3.3	134
Small town apt. dwellers	3.2	173

DMA household income (1991)

Median HH income	$35,580
Aggregate HH income	$136.97 billion
Median family income	$46,408

Most affluent counties
(by 1991 median HH income)

1. DuPage	$52,290
2. Lake (Ill.)	$47,397
3. McHenry	$42,979
4. Kane	$38,550
5. Will	$38,334



John Hall

DMA HH income distribution (1991)

$0-7,499	8.3%
$7,500-9,999	4.2%
$10,000-14,999	7.0%
$15,000-24,999	14.3%
$25,000-34,999	15.5%
$35,000-49,999	19.4%
$50,000-74,999	18.3%
$75,000+	13.1%

Average HH net worth	$218,466
Regional index	124.0
National index	110.5

DMA age distribution 1992

0-5	8.9%
6-13	11.3%
14-17	5.6%
18-24	10.2%
25-34	17.2%
35-44	15.6%
45-54	10.8%
55-64	8.2%
65+	11.7%
Median age	33.06
Median age adult population	40.86

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. DuPage	+57,850
2. Lake (Ill.)	+37,159
3. Kane	+19,381
4. McHenry	+18,295
5. Will	+14,455

Retail sales*

Chicago-Gary-Lake County, Ill.-Ind.-Wis. CMSA, 1991	$68.643 billion
Change from 1990	+1.7%

1992/1991 retail sales trend

April 1992	$5.578 billion, –3.2%
Jan.-April 1992	+0.4%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 5.1% in the Lake County (Ill.) Primary MSA to 8.9% in the Joliet PMSA. In the Chicago PMSA, the rate was 7.7%.
Source: U.S. Labor Department

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#4 Philadelphia

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 4

		% U.S.
DMA TV HHs	2,634,970	2.863
DMA population	7,242,200	2.860

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	7,018.1	100	2.86	100
Total adults	5,477.0	100	2.92	100
Men (18+)	2,573.7	47	2.86	98
Women (18+)	2,903.3	53	2.97	102

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	5,649.8	81	2.76	96
Hispanic	295.6	4	1.30	46
Non-White	1,368.3	19	3.40	119
Black	1,193.6	17	3.97	139

DMA households

	(000)	%DMA	%U.S.	Index
Total	2,666.6	100	2.85	100
Owner-occupied	1,859.1	70	3.09	109
Rented	807.5	30	2.41	85

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	662.6	25	2.88	101
2 members	820.9	31	2.74	96
3 members	472.3	18	2.90	102
4 members	413.4	16	2.93	103
5 members	188.2	7	2.99	105
6+ members	109.2	4	2.76	97

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	456.9	17	2.77	97

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	658.0	25	2.59	91
35-54	996.4	37	2.82	99
55+	1,012.2	38	3.08	108

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	129.6	5	2.19	77
$5,000-9,999	208.8	8	2.48	87
$10,000-14,999	215.2	8	2.42	85
$15,000-19,999	216.3	8	2.45	86
$20,000-24,999	210.4	8	2.55	90
$25,000+	1,686.3	63	3.16	111

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	994.7	37	3.00	105
Two or more	1,225.3	46	2.49	88
No car	446.6	17	3.95	139

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

American Stores	164
A&P Tea Co.	69
Supermarkets General	36
Laneco	32
Genuardi Supermarkets	28
Weiss Markets	16

Major discount department stores

Kmart	65
Jamesway Corp.	38
Clover	24
Bradlees	22

Major drug, health & beauty aids stores

Rite Aid Corp.	235
Thrift Drug	156
Melville Corp.	81
Pathmark Drug Stores	37
Jack Eckerd Corp.	32
Medicine Shoppe International	28

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

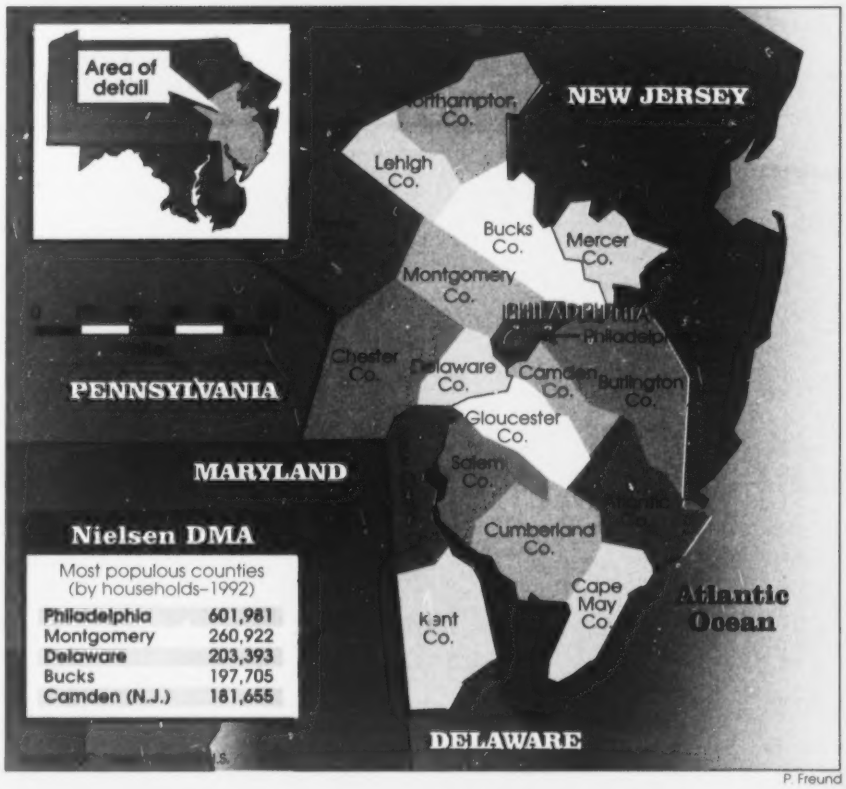
ClusterPLUS™ category	% of HHs	Index
Low income blue collar workers	9.8	460
Older non-mobile urban HHs	6.4	250
Older small town HHs	6.1	266
Urban working families	4.2	175
Non-urban working families	4.1	135
Rural families w/children	4.1	96
Lowest income urban blacks	3.9	269
Suburban families w/teens	3.8	173
Small town families	3.8	155

DMA household income (1991)

Median HH income	$35,181
Aggregate HH income	$124.18 billion
Median family income	$43,377

Most affluent counties
(by 1991 median HH income)

1. Chester (Pa.)	$46,911
2. Montgomery (Pa.)	$46,396
3. Burlington (N.J.)	$45,501
4. Bucks (Pa.)	$44,652
5. Gloucester (N.J.)	$40,770



P. Freund

DMA HH income distribution (1991)

$0-7,499	7.8%
$7,500-9,999	4.9%
$10,000-14,999	7.6%
$15,000-24,999	14.8%
$25,000-34,999	14.6%
$35,000-49,999	17.8%
$50,000-74,999	17.6%
$75,000+	14.8%

Average HH net worth	$267,451
Regional index	118.3
National index	135.2

DMA age distribution 1992

0-5	8.3%
6-13	10.6%
14-17	5.3%
18-24	10.0%
25-34	16.3%
35-44	15.3%
45-54	10.9%
55-64	8.9%
65+	14.0%
Median age	34.58
Median age adult population	42.30

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Chester (Pa.)	+27,511
2. Bucks (Pa.)	+24,734
3. New Castle (Del.)	+18,725
4. Atlantic (N.J.)	+15,689
5. Gloucester (N.J.)	+13,885

Retail sales*
Philadelphia-Wilmington-Trenton CMSA

1991	$47.873 billion
Change from 1990	−4.3%

1992/1991 retail sales trend

April 1992	$4.022 billion, +3.0%
Jan.-April 1992	+5.0%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 5.5% in the Trenton Primary MSA to 11.3% in the Vineland-Millville-Bridgeton (N.J.) PMSA. In the Philadelphia PMSA, the rate was 7.4%.
Source: U.S. Labor Department

REASON NUMBER 2 TO READ ADVERTISING AGE: JAMESBRADY

Advertising Age
WHERE PHILADELPHIA GETS THE WORD
On Marketing

#5 San Francisco/ Oakland/San Jose

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 5

		% U.S.
DMA TV HHs	2,215,470	2.407
DMA population	6,119,800	2.417

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	5,932.1	100	2.42	100
Total adults	4,703.6	100	2.50	100
Men (18+)	2,316.6	49	2.58	103
Women (18+)	2,387.0	51	2.44	97

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	4,393.4	74	2.15	89
Hispanic	919.2	15	4.05	167
Non-White	1,538.7	26	3.82	158
Black	515.5	9	1.71	71

DMA households

	(000)	%DMA	%U.S.	Index
Total	2,282.7	100	2.44	100
Owner-occupied	1,291.5	57	2.15	88
Rented	991.2	43	2.95	121

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	596.6	26	2.60	106
2 members	742.5	33	2.47	101
3 members	379.1	17	2.33	96
4 members	314.0	14	2.22	91
5 members	138.9	6	2.21	90
6+ members	111.6	5	2.82	116

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	382.4	17	2.32	95

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	620.6	27	2.44	100
35-54	950.8	42	2.69	110
55+	711.3	31	2.16	89

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	93.7	4	1.58	65
$5,000-9,999	133.4	6	1.59	65
$10,000-14,999	146.8	6	1.65	68
$15,000-19,999	152.9	7	1.73	71
$20,000-24,999	155.5	7	1.89	77
$25,000+	1600.4	70	3.00	123

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	811.3	36	2.44	100
Two or more	1,207.5	53	2.46	101
No car	263.9	12	2.33	96

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Safeway Stores	153
Lucky Stores	125
Quality Foods Intl	25
Save Mart Stores	24
Market Wholesale Grocery	19

Major discount department stores

Kmart	26
Marshalls	15
Target	14
Costco Wholesale	10

Major drug, health & beauty aids stores

Longs Drug Stores	83
Thrifty Corp	83
Walgreen Co	65
Pay Less Drug Stores	47
Bill's Drugs	22
Merrill Reese	10

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category	% of HHs	Index
Highly mobile working couples	8.9	126
Affluent urban singles	8.6	361
Young urban ethnics	6.7	259
Young urban educated singles	6.1	215
Young professionals	4.7	302
Established affluents	4.2	200
Middle income Hispanics	3.9	240
Older mobile well-educated	3.8	147
Urban working families	3.8	159
Mobile wealthy w/children	3.7	291
Established wealthy	3.6	308

DMA household income (1991)

Median HH income	$39,961
Aggregate HH income	$113.26 billion
Median family income	$52,807

Most affluent counties
(by 1991 median HH income)

1. Marin	$49,129
2. San Mateo	$47,391
3. Santa Clara	$46,627
4. Contra Costa	$42,359
5. Alameda	$35,825

John Hall

DMA HH income distribution (1991)

$0-7,499	6.4%
$7,500-9,999	4.5%
$10,000-14,999	6.5%
$15,000-24,999	13.4%
$25,000-34,999	13.3%
$35,000-49,999	18.1%
$50,000-74,999	19.3%
$75,000+	18.6%

Average HH net worth	$446,555
Regional index	166.2
National index	225.8

DMA age distribution 1992

0-5	8.2%
6-13	10.1%
14-17	4.8%
18-24	9.6%
25-34	18.2%
35-44	17.4%
45-54	11.8%
55-64	8.0%
65+	11.4%
Median age	34.42
Median age adult population	40.79

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Santa Clara	90,710
2. Alameda	+82,050
3. Contra Costa	+70,755
4. Sonoma	+46,371
5. Solano	+28,604

Retail sales*

San Francisco-Oakland-San Jose CMSA 1991	$50.559 billion
Change from 1990	−3.1%

1992/1991 retail sales trend

April 1992	$4.318 billion, −0.3%
Jan.-April 1992	+1.9%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 5.3% in the San Francisco Primary MSA to 5.9% in the Oakland PMSA, 6.4% in the San Jose PMSA and 7.7% in the Vallejo-Fairfield-Napa PMSA.
Source: U.S. Labor Department

REASON NUMBER 14 TO READ ADVERTISING AGE: MarketPlace

Advertising Age
WHERE SAN FRANCISCO GETS THE WORD
On Marketing

#6 Boston

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 6

		% U.S.
DMA TV HHs	2,109,710	2.292
DMA population	5,731,500	2.264

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	5,555.4	100	2.27	100
Total adults	4,417.8	100	2.35	100
Men (18+)	2,093.0	47	2.33	99
Women (18+)	2,324.8	53	2.38	101

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	5,098.1	92	2.49	110
Hispanic	240.4	4	1.06	47
Non-White	457.3	8	1.14	50
Black	278.3	5	0.93	41

DMA households

	(000)	%DMA	%U.S.	Index
Total	2,138.7	100	2.28	100
Owner-occupied	1,293.4	60	2.15	94
Rented	845.3	40	2.52	110

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	540.5	25	2.35	103
2 members	672.9	31	2.24	98
3 members	375.0	18	2.30	101
4 members	332.6	16	2.36	103
5 members	144.5	7	2.30	100
6+ members	73.2	3	1.85	81

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	353.1	17	2.14	94

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	580.5	27	2.29	100
35-54	811.2	38	2.29	100
55+	747.0	35	2.27	99

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	80.8	4	1.36	60
$5,000-9,999	154.0	7	1.83	80
$10,000-14,999	162.5	8	1.82	80
$15,000-19,999	158.3	7	1.79	78
$20,000-24,999	158.5	7	1.92	84
$25,000+	1,424.6	67	2.67	117

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	881.9	41	2.66	116
Two or more	930.4	44	1.89	83
No car	326.4	15	2.89	126

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Purity Supreme Markets	58
Demoulas Supermarkets	45
Stop and Shop	44
Shaws Supermarkets	41
Star Market	33

Major discount department stores

Ames Dept. Stores	43
Bradlees	37
Marshalls	33
Kmart	21

Major drug, health & beauty aids stores

Melville Corp.	187
Hook-SuperX	60
American Drug Stores	53
Walgreen Co.	51
CVS (Consumer Value Store)	34
Rite Aid Corp.	31

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

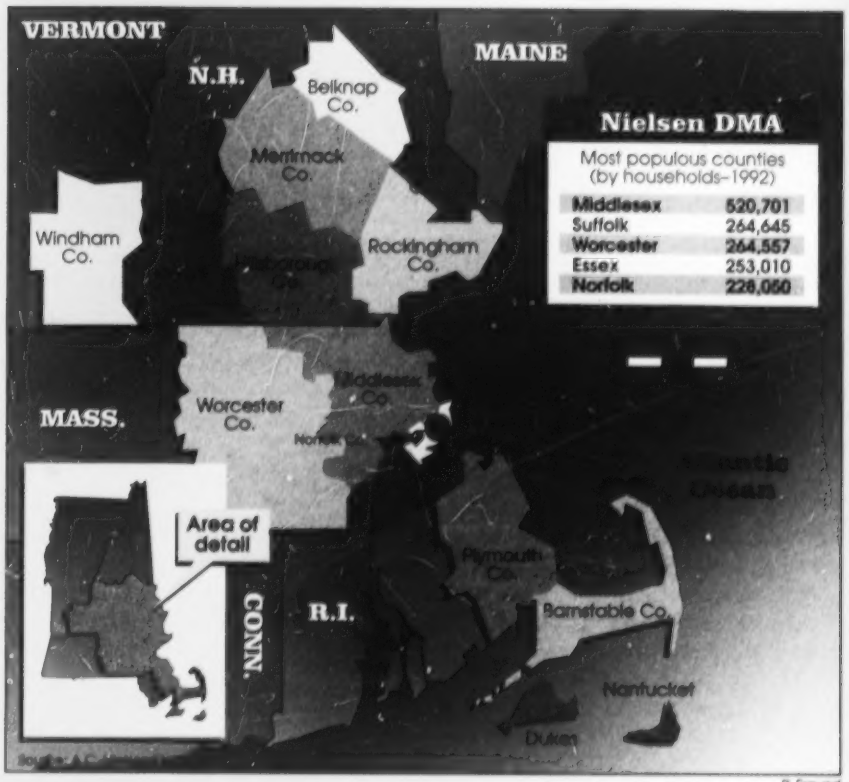
	% of HHs	Index
Older non-mobile urban HHs	10.7	418
Small town apt. dwellers	9.6	514
Old urban ethnics	8.4	384
Non-urban working families	5.9	197
Established affluents	4.7	220
Suburban families w/teens	4.2	190
Older mobile well educated	4.1	158
Rural families w/children	3.9	91
Working couples w/children	3.1	229
Affluent urban singles	3.0	126

DMA household income (1991)

Median HH income	$40,549
Aggregate HH income	$117.02 billion
Median family income	$51,058

Most affluent counties
(by 1991 median HH income)

1. Norfolk (Mass.)	$49,858
2. Middlesex (Mass)	$46,687
3. Rockingham (N.H.)	$44,874
4. Hillsborough (N.H.)	$43,902
5. Plymouth (Mass.)	$41,575



P. Freund

DMA HH income distribution (1991)

$0-7,499	5.9%
$7,500-9,999	4.3%
$10,000-14,999	7.1%
$15,000-24,999	13.2%
$25,000-34,999	12.8%
$35,000-49,999	18.1%
$50,000-74,999	19.9%
$75,000+	18.7%

Average HH net worth	$482,968
Regional index	223.1
National index	244.2

DMA age distribution 1992

0-5	8.1%
6-13	9.9%
14-17	5.1%
18-24	10.5%
25-34	17.8%
35-44	16.0%
45-54	10.9%
55-64	8.3%
65+	13.1%
Median age	34.15
Median age adult population	41.03

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Hillsborough (N.H.)	+29,261
2. Rockingham (N.H.)	+29,072
3. Worcester (Mass.)	+28,186
4. Barnstable (Mass.)	+18,402
5. Essex (Mass.)	+14,234

Retail sales*
Boston-Lawrence-Salem-Lowell-Brockton NECMA

1991	$28.391 billion
Change from 1990	+1.5%

1992/1991 retail sales trend

April 1992	$2.536 billion, +16.0%
Jan.-April 1992	+13.3%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Dept. NECMA is New England County Metropolitan Area.

Unemployment trends
Unemployment within the NECMA in April 1992 ranged from 7.5% in the Boston Primary MSA to 10.3% in the Brockton PMSA.
Source: U.S. Labor Department

REASON NUMBER 3 TO READ ADVERTISING AGE:

Advertising Age
WHERE BOSTON GETS THE WORD
On Marketing

#7 Washington

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 7

		% U.S.
DMA TV HHs	1,819,900	1.977
DMA population	4,984,200	1.969

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	4,824.6	100	1.97	100
Total adults	3,784.2	100	2.02	100
Men (18+)	1,820.6	48	2.02	101
Women (18+)	1,963.6	52	2.01	100

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,469.7	72	1.69	86
Hispanic	246.6	5	1.09	55
Non-White	1,354.9	28	3.36	171
Black	1,109.7	23	3.69	188

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,846.5	100	1.97	100
Owner-occupied	1,161.1	63	1.93	98
Rented	685.4	37	2.04	104

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	451.4	24	1.96	100
2 members	575.3	31	1.92	97
3 members	343.5	19	2.11	107
4 members	284.5	15	2.02	102
5 members	119.7	6	1.90	96
6+ members	72.1	4	1.82	92

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	330.7	18	2.01	102

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	532.5	29	2.10	106
35-54	794.7	43	2.25	114
55+	519.3	28	1.58	80

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	73.0	4	1.23	63
$5,000-9,999	90.8	5	1.08	55
$10,000-14,999	107.8	6	1.21	61
$15,000-19,999	123.4	7	1.40	71
$20,000-24,999	131.2	7	1.59	81
$25,000+	1,320.3	72	2.48	126

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	655.5	35	1.98	100
Two or more	986.6	53	2.01	102
No car	204.4	11	1.81	92

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Safeway Stores	109
Giant Food	105
A & P Tea Co.	39
Food Lion Stores/Save Rite	26
Jumbo Food Stores	19

Major discount department stores

Kmart	30
Ames Dept. Stores	28
Marshalls	11
Jamesway Corp.	8

Major drug, health & beauty aids stores

Melville Corp.	195
Rite Aid Corp.	106
Revco D.S.	21
Drug Emporium	20
Standard Drug Co.	15
The Cosmetic Centers	14

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

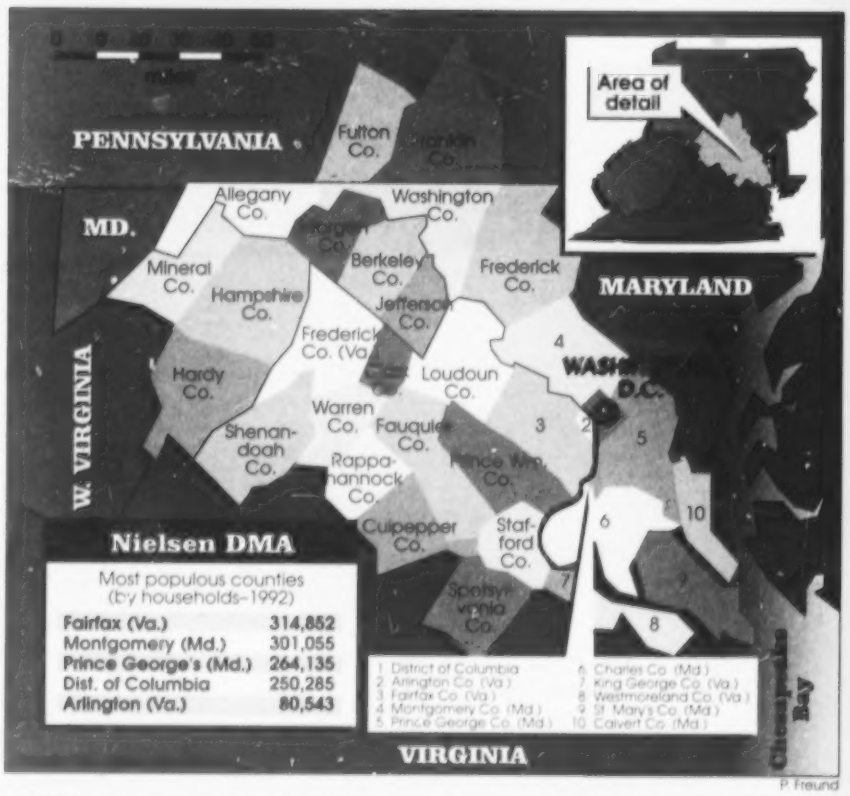
	% of HHs	Index
Affluent urban singles	10.8	450
Young affluents w/children	9.3	331
Highly mobile working couples	8.9	125
Suburban families w/teens	5.3	241
Non-urban working families	4.1	137
Established wealthy	4.0	344
Established affluents	4.0	191
Young urban educated singles	3.6	125
Rural families w/children	3.4	78
Center city blacks	3.4	245

DMA household income (1991)

Median HH income	$43,625
Aggregate HH income	$101.62 billion
Median family income	$55,107

Most affluent counties
(by 1991 median HH income)

1. Fairfax (Va.)	$63,679
2. Fairfax City (Va.)	$57,059
3. Montgomery (Md.)	$55,379
4. Falls Church City (Va.)	$55,254
5. Prince William (Va.)	$53,507



P. Freund

DMA HH income distribution (1991)

$0-7,499	5.4%
$7,500-9,999	3.5%
$10,000-14,999	5.3%
$15,000-24,999	12.6%
$25,000-34,999	12.9%
$35,000-49,999	17.7%
$50,000-74,999	20.9%
$75,000+	21.6%

Average HH net worth	$276,564
Regional index	161.5
National index	139.8

DMA age distribution 1992

0-5	8.4%
6-13	10.3%
14-17	5.1%
18-24	10.3%
25-34	18.7%
35-44	17.2%
45-54	12.1%
55-64	7.8%
65+	9.6%
Median age	33.41
Median age adult population	39.98

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Fairfax (Va.)	+124,632
2. Montgomery (Md.)	+96,655
3. Prince William (Va.)	+45,027
4. Prince George's (Md.)	+27,028
5. Frederick (Md.)	+19,268

Retail sales*

Washington, D.C.-Md.-Va. MSA	
1991	$35.217 billion
Change from 1990	−0.6%

1992/1991 retail sales trend

April 1992	$2.810 billion,	−2.3%
Jan.-April 1992		−1.4%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. MSA is Metropolitan Statistical Area.

Unemployment trends
Unemployment within the Washington Metropolitan Statistical Area in April 1992 was 7.3% in the District of Columbia and 4.7% for the MSA.
Source: U.S. Labor Department

The way the Washington DC market gets its news has changed-shouldn't the way you buy it?

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#8 Dallas/ Fort Worth

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 8

		% U.S.
DMA TV HHs	1,760,270	1.912
DMA population	4,783,600	1.889

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	4,613.8	100	1.88	100
Total adults	3,479.0	100	1.85	100
Men (18+)	1,691.4	49	1.88	102
Women (18+)	1,787.6	51	1.83	99

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,841.3	83	1.88	100
Hispanic	575.5	12	2.54	135
Non-White	772.5	17	1.92	102
Black	626.6	14	2.08	111

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,787.1	100	1.91	100
Owner-occupied	1,056.0	59	1.76	92
Rented	731.1	41	2.18	114

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	448.8	25	1.95	102
2 members	556.8	31	1.86	97
3 members	315.4	18	1.94	102
4 members	274.7	15	1.95	102
5 members	117.4	7	1.86	98
6+ members	74.0	4	1.87	98

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	352.0	20	2.14	112

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	600.8	34	2.37	124
35-54	693.9	39	1.96	103
55+	492.4	28	1.50	78

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	108.8	6	1.84	96
$5,000-9,999	139.6	8	1.66	87
$10,000-14,999	155.1	9	1.74	91
$15,000-19,999	161.6	9	1.83	96
$20,000-24,999	154.8	9	1.88	98
$25,000+	1,067.2	60	2.00	105

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	577.4	32	1.74	91
Two or more	1,094.2	61	2.23	117
No car	115.5	6	1.02	54

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Minyard Food Stores	74
Kroger	67
Winn-Dixie Stores	59
The Cullum Companies	55
Skaggs Alpha Beta	41

Major discount department stores

Wal-Mart	59
Kmart	43
Target	16
50 Off Stores	8

Major drug, health & beauty aids stores

Jack Eckerd Corp.	181
Revco D.S.	99
American Drug Stores	40
Sack 'n Save	30
Cullum Co.	17
True Quality Pharmacies	16

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

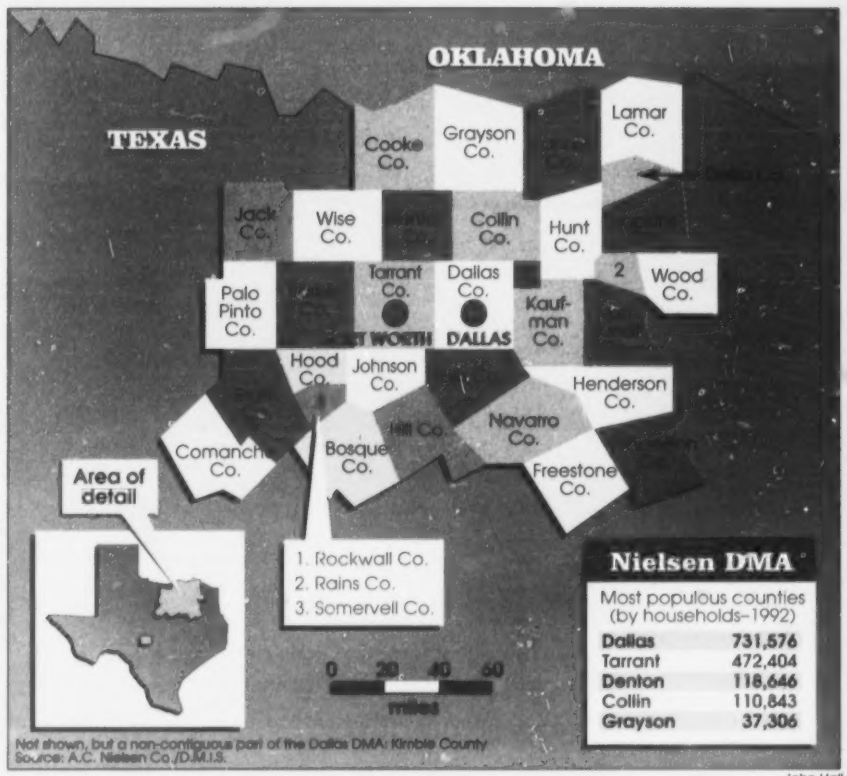
	% of HHs	Index
Highly mobile working couples	11.7	164
Young urban educated singles	10.2	357
Young affluents w/children	7.7	275
Highly mobile young families	6.8	267
Average income families in SFDUs	5.6	183
Small town families	4.1	169
Low income farmers	3.7	197
Older below avg. income homeowners	2.9	118

DMA household income (1991)

Median HH income	$31,634
Aggregate HH income	$72.13 billion
Median family income	$38,520

Most affluent counties
(by 1991 median HH income)

1. Collin	$45,411
2. Rockwall	$39,961
3. Denton	$38,833
4. Tarrant	$34,296
5. Dallas	$31,932



Not shown, but a non-contiguous part of the Dallas DMA: Kimble County
Source: A.C. Nielsen Co./D.M.I.S.

John Hall

DMA HH income distribution (1991)

$0-7,499	9.3%
$7,500-9,999	4.3%
$10,000-14,999	8.0%
$15,000-24,999	17.0%
$25,000-34,999	17.1%
$35,000-49,999	17.6%
$50,000-74,999	15.4%
$75,000+	11.2%

Average HH net worth	$267,661
Regional index	155.4
National index	135.3

DMA age distribution 1992

0-5	9.6%
6-13	11.7%
14-17	5.5%
18-24	10.6%
25-34	19.1%
35-44	15.9%
45-54	10.5%
55-64	7.2%
65+	9.4%
Median age	31.47
Median age adult population	38.90

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Tarrant	+186,782
2. Dallas	+150,610
3. Collin	+80,171
4. Denton	+76,712
5. Johnson	+18,918

Retail sales*
Dallas-Fort Worth CMSA.

1991	$31.227 billion
Change from 1990	+2.5%

1992/1991 retail sales trend

April 1992	$2.776 billion,	+8.2%
Jan.-April 1992		+7.9%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropoiitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 7.0% in the Dallas Primary Metropoiitan Statistical Area to 7.5% in the Fort Worth-Arlington PMSA.
Source: U.S. Labor Department

REASON NUMBER 4 TO READ ADVERTISING AGE:

T.N.T.
The Next Trend

Advertising Age
WHERE DALLAS/FORT WORTH GETS THE WORD
On Marketing

#9 Detroit

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 9

		% U.S.
DMA TV HHs	1,714,970	1.863
DMA population	4,686,500	1.851

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	4,530.0	100	1.85	100
Total adults	3,464.4	100	1.84	100
Men (18+)	1,634.8	47	1.82	99
Women (18+)	1,829.6	53	1.87	101

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,484.6	77	1.70	92
Hispanic	89.2	2	0.39	21
Non-White	1,045.4	23	2.59	140
Black	950.8	21	3.16	171

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,733.0	100	1.85	100
Owner-occupied	1,193.7	69	1.99	107
Rented	539.3	31	1.61	87

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	423.0	24	1.84	99
2 members	527.2	30	1.76	95
3 members	310.8	18	1.91	103
4 members	273.7	16	1.94	105
5 members	124.5	7	1.98	107
6+ members	73.8	4	1.87	101

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	309.5	18	1.88	101

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	457.8	26	1.80	97
35-54	681.7	39	1.93	104
55+	593.5	34	1.80	97

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	106.2	6	1.79	97
$5,000-9,999	146.9	8	1.75	94
$10,000-14,999	143.0	8	1.61	87
$15,000-19,999	134.7	8	1.52	82
$20,000-24,999	132.9	8	1.61	87
$25,000+	1,069.3	62	2.01	108

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	604.3	35	1.82	98
Two or more	941.6	54	1.92	104
No car	187.1	11	1.66	89

Major retail outlets 1991

Chains with largest number of stores in the market.

Supermarkets

A & P Tea Co./Bormans	117
Kroger	74
Meijer	17
Danny's Markets	11
Seaway Food Town	9

Major discount department stores

Kmart	59
Meijer	17
Target	16
Marshalls	9

Major drug, health & beauty aids stores

Perry Drug Stores	115
Arbor Drugs	104
A.L. Price	23
F&M Distributors	20
Concord/Wrigley Drugs	13
M & R Pharmacy	10

ClusterPLUS™ lifestyles/demographics

Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category	% of HHs	Index
Urban working families	7.8	325
Older small town HHs	6.5	283
Avg. income blue collar families	5.1	363
Lowest income black female head HHs	4.8	363
Small town families	4.5	182
Suburban families with teens	4.0	182
Highly mobile working couples	4.0	56
Young affluents w/children	3.6	127
Young ex-urban families	3.5	220

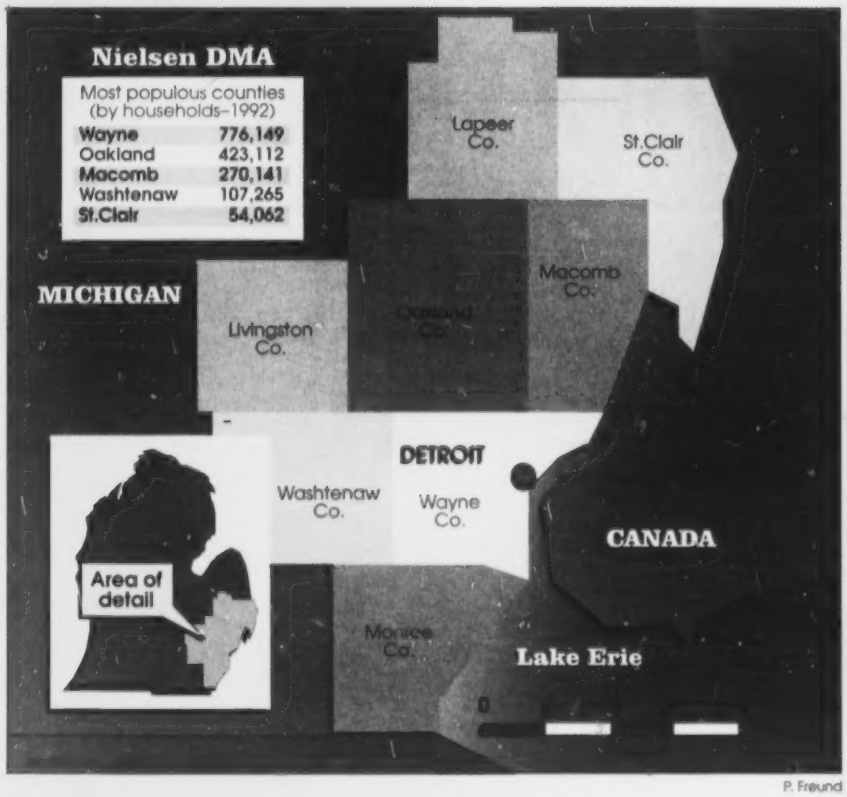
DMA household income (1991)

Median HH income	$36,178
Aggregate HH income	$75.79 billion
Median family income	$46,299

Most affluent counties

(by 1991 median HH income)

1. Oakland	$44,685
2. Livingston	$41,078
3. Macomb	$39,279
4. Washtenaw	$38,877
5. Monroe	$33,989



P. Freund

DMA HH income distribution (1991)

$0-7,499	8.2%
$7,500-9,999	4.4%
$10,000-14,999	6.9%
$15,000-24,999	13.5%
$25,000-34,999	15.4%
$35,000-49,999	19.9%
$50,000-74,999	18.7%
$75,000+	12.9%

Average HH net worth	$225,370
Regional index	127.2
National index	113.9

DMA age distribution 1992

0-5	8.7%
6-13	11.1%
14-17	5.6%
18-24	10.3%
25-34	16.5%
35-44	15.8%
45-54	11.1%
55-64	8.4%
65+	11.9%
Median age	33.52
Median age adult population	41.26

County growth forecasts

Counties forecast to have the largest population gains 1992-1997.

1. Oakland	+26,496
2. Washtenaw	+7,430
3. Livingston	+6,636
4. St. Clair	+2,443
5. Lapeer	+1,641

Retail sales*

Detroit-Ann Arbor CMSA

1991	$35.140 billion
Change from 1990	+0.8%

1992/1991 retail sales trend

April 1992	$3.044 billion, +5.8%
Jan.-April 1992	+7.1%

*Estimated retail sales, not seasonally adjusted, U.S Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends

Unemployment within the CMSA in April 1992 ranged from 5.2% in the Ann Arbor Primary Metropolitan Statistical Area to 9.2% in the Detroit PMSA.

Source: U.S. Labor Department

REASON NUMBER 5 TO READ ADVERTISING AGE: FORUM

Advertising Age
WHERE DETROIT GETS THE WORD
On Marketing

#10 Houston

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 10

		% U.S.
DMA TV HHs	1,445,550	1.571
DMA population	4,117,500	1.626

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,968.8	100	1.62	100
Total adults	2,926.3	100	1.56	100
Men (18+)	1,446.7	49	1.61	103
Women (18+)	1,479.6	51	1.51	97

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,080.9	78	1.50	93
Hispanic	827.4	21	3.65	225
Non-White	887.9	22	2.20	136
Black	718.7	18	2.39	148

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,473.4	100	1.57	100
Owner-occupied	841.4	57	1.40	89
Rented	632.0	43	1.88	120

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	361.4	25	1.57	100
2 members	423.1	29	1.41	90
3 members	260.1	18	1.60	102
4 members	236.3	16	1.67	106
5 members	112.1	8	1.78	113
6+ members	80.4	5	2.03	129

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	306.9	21	1.86	118

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	476.2	32	1.88	119
35-54	614.5	42	1.74	110
55+	382.7	26	1.16	74

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	101.0	7	1.70	108
$5,000-9,999	105.2	7	1.25	79
$10,000-14,999	124.8	8	1.40	89
$15,000-19,999	131.2	9	1.48	94
$20,000-24,999	124.9	8	1.52	96
$25,000+	886.3	60	1.66	106

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	509.5	35	1.54	98
Two or more	858.6	58	1.75	111
No car	105.3	7	0.93	59

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Kroger Co.	69
Appletree Markets	56
Randalls Food Markets	42
Gerlands Food Fair	30
Rice Food Markets	29
Brookshire Brothers	29

Major discount department stores

Wal-Mart	46
Kmart	34
Target	15
Marshalls	9

Major drug, health & beauty aids stores

Jack Eckerd Corp.	144
Walgreen Co.	112
Ralston Drug Stores	17
Medi-Save Pharmacies	11
Clinic Drugs	7
Phar-Mor	7

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

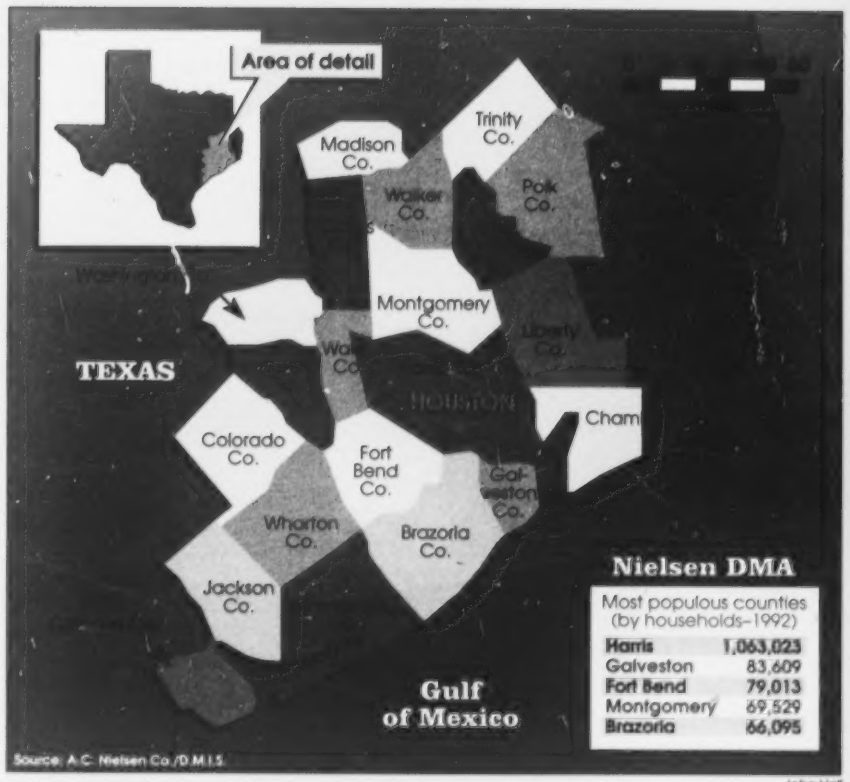
	% of HHs	Index
Highly mobile working couples	18.1	254
Young urban educated singles	11.7	409
Young affluents w/children	10.0	358
Highly mobile young families	7.5	295
Average income families in SFDUs	6.8	220
Middle income Hispanics	3.7	224
Low income farmers	3.6	191
Young urban ethnics	2.9	112

DMA household income (1991)

Median HH income	$30,353
Aggregate HH income	$54.84 billion
Median family income	$38,595

Most affluent counties
(by 1991 median HH income)

1. Fort Bend	$38,897
2. Brazoria	$35,809
3. Galveston	$30,590
4. Montgomery	$30,445
5. Harris	$30,430



John Hall

DMA HH income distribution (1991)

$0-7,499	9.9%
$7,500-9,999	3.7%
$10,000-14,999	8.3%
$15,000-24,999	18.4%
$25,000-34,999	18.0%
$35,000-49,999	20.2%
$50,000-74,999	14.2%
$75,000+	7.2%

Average HH net worth	$167,817
Regional index	97.0
National index	84.8

DMA age distribution 1992

0-5	9.9%
6-13	12.5%
14-17	5.9%
18-24	10.5%
25-34	18.4%
35-44	16.8%
45-54	10.5%
55-64	7.0%
65+	8.0%
Median age	31.13
Median age adult population	38.70

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Harris	+201,457
2. Fort Bend	+59,565
3. Montgomery	+31,695
4. Brazoria	+10,344
5. Galveston	+9,638

Retail sales*

Houston-Galveston-Brazoria CMSA	
1991	$30.113 billion
Change from 1990	+5.0%

1992/1991 retail sales trend

April 1992	$2.641 billion, +11.6%
Jan.-April 1992	+7.2%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 6.9% in the Houston Primary MSA to 7.5% in the Brazoria PMSA and 8.6% in the Galveston-Texas City PMSA.
Source: U.S. Labor Department

Reason Number 6 To Read Advertising Age: AD REVIEW

Advertising Age
Where Houston gets the word
On Marketing

#11 Atlanta

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 11

		% U.S.
DMA TV HHs	1,444,390	1.569
DMA population	3,940,600	1.556

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,810.2	100	1.55	100
Total adults	2,913.4	100	1.55	100
Men (18+)	1,390.6	48	1.55	100
Women (18+)	1,522.8	52	1.56	100

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,841.3	75	1.39	89
Hispanic	73.1	2	0.32	21
Non-White	968.9	25	2.40	155
Black	895.1	23	2.98	192

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,464.8	100	1.56	100
Owner-occupied	940.2	64	1.56	100
Rented	524.6	36	1.56	100

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	332.3	23	1.45	92
2 members	467.3	32	1.56	100
3 members	285.1	19	1.75	112
4 members	236.8	16	1.68	107
5 members	93.9	6	1.49	95
6+ members	49.4	3	1.25	80

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	272.6	19	1.65	106

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	459.3	31	1.81	116
35-54	608.3	42	1.72	110
55+	397.2	27	1.21	77

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	92.9	6	1.57	100
$5,000-9,999	112.1	8	1.33	85
$10,000-14,999	120.9	8	1.36	87
$15,000-19,999	127.1	9	1.44	92
$20,000-24,999	125.3	9	1.52	97
$25,000+	886.5	61	1.66	106

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	451.9	31	1.36	87
Two or more	872.2	60	1.77	113
No car	140.7	10	1.24	80

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Winn-Dixie Stores	81
Kroger	74
Grand Union	52
Ingles Markets	47
A & P Tea Co.	26

Major discount department stores

Kmart	52
Wal-Mart	46
Target	15
Marshalls	11

Major drug, health & beauty aids stores

Jack Eckerd Corp.	109
Revco D.S.	85
Big B	77
Thrift Drug	60
Drug Emporium	23

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

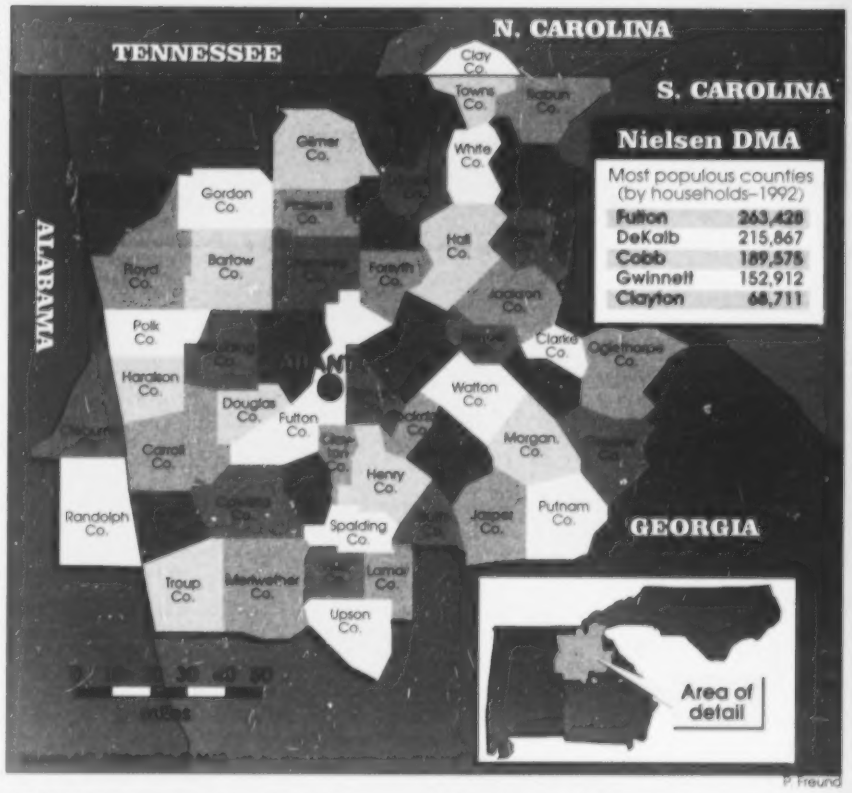
	% of HHs	Index
Southern low income workers	11.5	356
Highly mobile young families	8.9	348
Highly mobile working couples	8.1	113
Young affluents w/children	6.7	238
Young urban educated singles	5.0	175
Rural families w/children	4.5	104
Non urban working families	4.0	132
Low income black families	4.0	213

DMA household income (1991)

Median HH income	$33,447
Aggregate HH income	$63.68 billion
Median family income	$38,495

Most affluent counties
(by 1991 median HH income)

1. Fayette	$50,536
2. Gwinnett	$45,166
3. Cobb	$44,756
4. Rockdale	$40,369
5. DeKalb	$39,733



P. Freund

DMA HH income distribution (1991)

$0-7,499	8.6%
$7,500-9,999	5.0%
$10,000-14,999	7.9%
$15,000-24,999	15.7%
$25,000-34,999	15.1%
$35,000-49,999	17.5%
$50,000-74,999	15.9%
$75,000+	14.3%

Average HH net worth $234,987
Regional index 137.9
National index 118.8

DMA age distribution 1992

0-5	8.8%
6-13	11.2%
14-17	5.6%
18-24	10.9%
25-34	18.3%
35-44	16.9%
45-54	11.4%
55-64	7.4%
65+	9.1%
Median age	32.29
Median age adult population	39.45

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

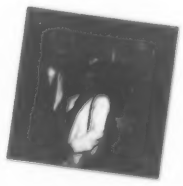
1. Gwinnett	+121,492
2. Cobb	+97,629
3. DeKalb	+27,770
4. Fulton	+27,349
5. Cherokee	+24,636

Retail sales*
Atlanta MSA
1991 $21.71 billion
Change from 1990 +2.7%

1992/1991 retail sales trend
April 1992 $1.973 billion, +16.4%
Jan.-April 1992 +12.2%
*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. MSA is Metropolitan Statistical Area.

Unemployment trends
Unemployment within the Atlanta Metropolitan Statistical Area in April 1992 was 5.3%.
Source: U.S. Labor Department

REASON NUMBER 15 TO READ ADVERTISING AGE: PHOTOREVIEW



Advertising Age
WHERE ATLANTA GETS THE WORD
On Marketing

#12 Cleveland

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 12

		% U.S.
DMA TV HHs	1,436,400	1.561
DMA population	3,823,600	1.510

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,704.9	100	1.51	100
Total adults	2,844.4	100	1.51	100
Men (18+)	1,328.9	47	1.48	98
Women (18+)	1,515.5	53	1.55	102

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,186.5	86	1.56	103
Hispanic	60.7	2	0.27	18
Non-White	518.4	14	1.29	85
Black	475.7	13	1.58	105

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,454.2	100	1.55	100
Owner-occupied	991.0	68	1.65	106
Rented	463.2	32	1.38	89

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	371.0	26	1.61	104
2 members	462.6	32	1.54	99
3 members	252.3	17	1.55	100
4 members	219.7	15	1.56	100
5 members	97.6	7	1.55	100
6+ members	51.0	4	1.29	83

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	238.1	16	1.44	93

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	357.2	25	1.41	91
35-54	542.4	37	1.53	99
55+	554.6	38	1.69	109

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	92.1	6	1.55	100
$5,000-9,999	132.1	9	1.57	101
$10,000-14,999	132.5	9	1.49	96
$15,000-19,999	131.2	9	1.48	96
$20,000-24,999	128.2	9	1.56	100
$25,000+	838.1	58	1.57	101

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	522.1	36	1.57	101
Two or more	770.5	53	1.57	101
No car	161.6	11	1.43	92

Major retail outlets 1991

Chains with largest number of stores in the market.

Supermarkets

Riser Foods	54
First National Supermarkets	48
Fred W. Albrecht Grocery	33
Heinens	10
Seaway Food Town	8

Major discount department stores

Kmart	42
Hills Dept. Stores	20
Fisher's Big Wheel	16
Ames Dept. Stores	13

Major drug, health & beauty aids stores

Rite Aid Corp.	148
Revco D.S.	97
Discount Drug Mart	29
Youngfellow Drug	28
Medic Discount Drug Store	23
Marc Glassman	18

ClusterPLUS™ lifestyles/demographics

Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

	% of HHs	Index
Older small town HHs	9.3	409
Low income blue collar workers	7.1	332
Rural families w/children	7.0	162
Small town families	5.5	224
Stable blue collar workers	5.3	279
Older non-mobile urban HHs	4.0	155
Average income blue collar families	3.8	271
Urban working families	3.3	138
Established affluents	3.2	149
Older mobile well educated	2.9	112

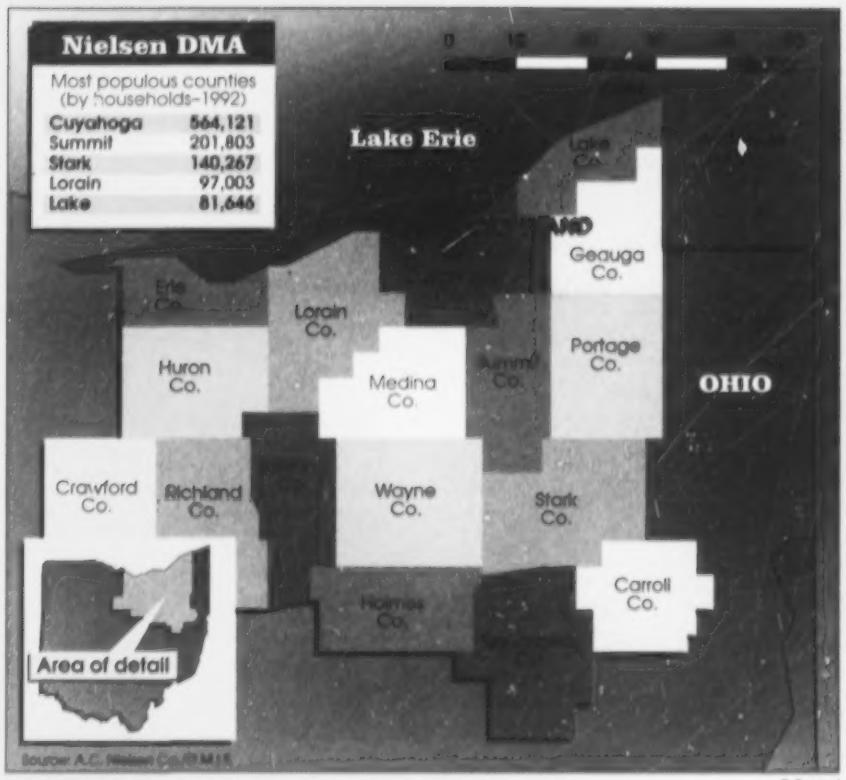
DMA household income (1991)

Median HH income	$30,080
Aggregate HH income	$54.39 billion
Median family income	$37,684

Most affluent counties

(by 1991 median HH income)

1. Geauga	$44,254
2. Medina	$39,231
3. Lake	$35,345
4. Lorain	$31,582
5. Erie	$31,056



P. Freund

DMA HH income distribution (1991)

$0-7,499	10.0%
$7,500-9,999	4.9%
$10,000-14,999	8.5%
$15,000-24,999	17.3%
$25,000-34,999	18.1%
$35,000-49,999	18.5%
$50,000-74,999	14.5%
$75,000+	8.0%

Average HH net worth	$249,521
Regional index	142.9
National index	126.2

DMA age distribution 1992

0-5	8.3%
6-13	11.1%
14-17	5.6%
18-24	9.8%
25-34	15.2%
35-44	15.2%
45-54	11.1%
55-64	9.2%
65+	14.2%
Median age	34.91
Median age adult population	43.03

County growth forecasts

Counties forecast to have the largest population gains 1992-1997.

1. Medina	+3,067
2. Portage	+2,507
3. Geauga	+2,144
4. Holmes	+1,848
5. Wayne	+1,309

Retail sales*

Cleveland-Akron-Lorain CMSA.

1991	$18.595 billion
Change from 1990	−6.1%

1992/1991 retail sales trend

April 1992	$1.687 billion, +11.6%
Jan.-April 1992	+11.2%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends

Unemployment within the CMSA in April 1992 ranged from 6.3% in the Cleveland Primary Metropolitan Statistical Area to 6.9% in the Akron PMSA.

Source: U.S. Labor Department

Reason Number 7 To Read Advertising Age: CONSIDERATIONS

Advertising Age
WHERE CLEVELAND GETS THE WORD
On Marketing

#13 Seattle/ Tacoma

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 13

		% U.S.
DMA TV HHs	1,369,620	1.488
DMA population	3,621,300	1.430

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,504.9	100	1.43	100
Total adults	2,705.0	100	1.44	100
Men (18+)	1,327.8	49	1.48	103
Women (18+)	1,377.2	51	1.41	98

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,108.9	89	1.52	106
Hispanic	109.1	3	0.48	34
Non-White	396.0	11	0.98	69
Black	137.5	4	0.46	32

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,410.7	100	1.51	100
Owner-occupied	872.1	62	1.45	96
Rented	538.6	38	1.61	107

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	364.3	26	1.59	105
2 members	488.2	35	1.63	108
3 members	231.8	16	1.42	95
4 members	200.9	14	1.42	94
5 members	82.1	6	1.30	86
6+ members	43.4	3	1.10	73

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	238.4	17	1.45	96

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	414.1	29	1.63	108
35-54	564.1	40	1.60	106
55+	432.5	31	1.31	87

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	69.5	5	1.17	78
$5,000-9,999	114.4	8	1.36	90
$10,000-14,999	120.1	9	1.35	89
$15,000-19,999	121.1	9	1.37	91
$20,000-24,999	113.9	8	1.38	92
$25,000+	871.7	62	1.64	109

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	462.0	33	1.39	92
Two or more	824.2	58	1.68	111
No car	124.5	9	1.10	73

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Safeway Stores	119
Albertson's	49
Keith Uddenberg	29
Quality Food Centers	26
Fred Meyer	19

Major discount department stores

Fred Meyer	24
Kmart	24
Target	12
Costco Wholesale Corp.	7

Major drug, health & beauty aids stores

Pay Less Drug Stores	38
The Bartell Drug Co.	36
Medicine Shoppe International	15
Drug Emporium	11
Western Drug Distributors	11
A & H Stores	9

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

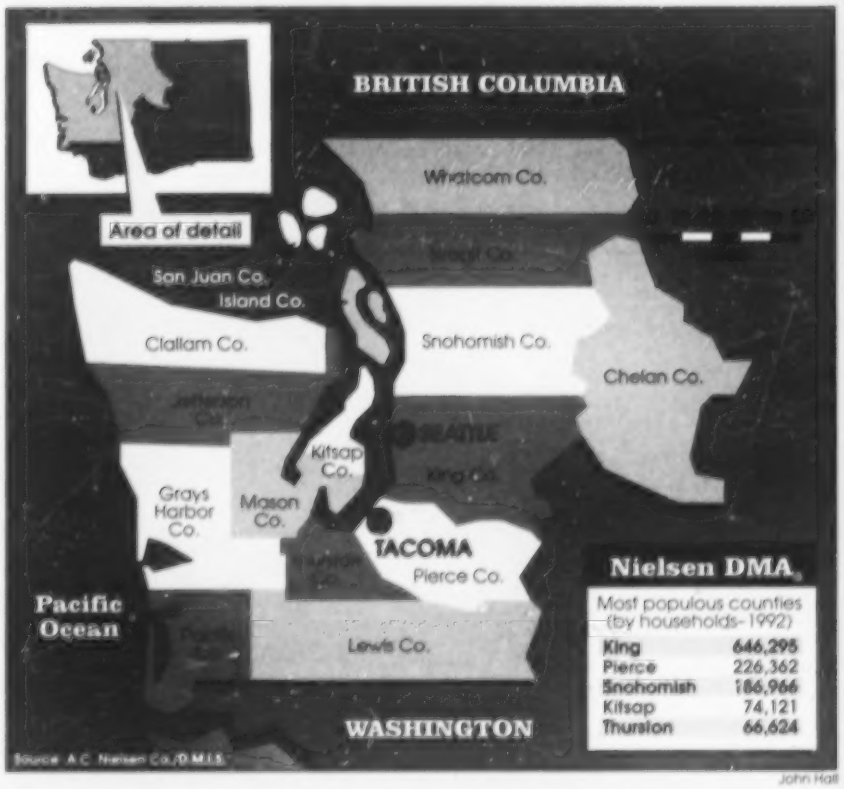
	% of HHs	Index
Highly mobile working couples	12.7	178
Young apartment dwellers	7.6	274
Non urban working families	6.0	200
Young urban ethnics	5.7	222
Highly mobile young families	5.0	197
Older mobile well educated	4.8	184
Young affluents w/children	3.9	140
Young professionals	3.8	249

DMA household income (1991)

Median HH income	$35,338
Aggregate HH income	$63.27 billion
Median family income	$45,757

Most affluent counties
(by 1991 median HH income)

1. King	$41,661
2. Snohomish	$39,539
3. Thurston	$34,511
4. Kitsap	$33,448
5. Whatcom	$31,877



John Hall

DMA HH income distribution (1991)

$0-7,499	7.7%
$7,500-9,999	4.5%
$10,000-14,999	7.4%
$15,000-24,999	15.0%
$25,000-34,999	15.0%
$35,000-49,999	18.8%
$50,000-74,999	17.5%
$75,000+	14.1%

Average HH net worth	$276,912
Regional index	108.4
National index	140.0

DMA age distribution 1992

0-5	8.7%
6-13	11.2%
14-17	5.2%
18-24	9.7%
25-34	16.9%
35-44	17.1%
45-54	11.3%
55-64	7.7%
65+	11.7%
Median age	33.87
Median age adult population	40.99

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. King	+119,472
2. Snohomish	+75,459
3. Pierce	+51,267
4. Kitsap	+23,223
5. Thurston	+19,284

Retail sales*

Seattle-Tacoma CMSA 1991	$22.0 billion
Change from 1990	+5.5%

1992/1991 retail sales trend

April 1992	$1.873 billion, +7.4%
Jan.-April 1992	+10.3%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 was reported as 5.6% in the Seattle Primary Metropolitan Statistical Area. No figure was reported for the Tacoma PMSA.
Source: U.S. Labor Department

REASON NUMBER 8 TO READ ADVERTISING AGE:

Advertising Age
WHERE SEATTLE GETS THE WORD
On Marketing

#14 Tampa/St. Petersburg/ Sarasota

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 14

		% U.S.
DMA TV HHs	1,365,800	1.484
DMA population	3,297,900	1.303

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,213.4	100	1.31	100
Total adults	2,620.2	100	1.40	100
Men (18+)	1,225.1	47	1.36	98
Women (18+)	1,395.1	53	1.43	102

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,892.1	90	1.41	108
Hispanic	191.1	6	0.84	64
Non-White	321.3	10	0.80	61
Black	279.4	9	0.93	71

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,383.8	100	1.48	100
Owner-occupied	978.3	71	1.63	110
Rented	405.5	29	1.21	82

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	371.7	27	1.62	109
2 members	567.2	41	1.89	128
3 members	201.9	15	1.24	84
4 members	149.5	11	1.06	72
5 members	60.5	4	0.96	65
6+ members	33.0	2	0.83	56

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	177.7	13	1.08	73

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	295.6	21	1.16	79
35-54	417.0	30	1.18	80
55+	671.2	49	2.04	138

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	81.0	6	1.37	93
$5,000-9,999	126.4	9	1.50	102
$10,000-14,999	154.4	11	1.73	117
$15,000-19,999	160.7	12	1.82	123
$20,000-24,999	145.1	10	1.76	119
$25,000+	716.2	52	1.34	91

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	656.4	47	1.98	134
Two or more	592.2	43	1.20	82
No car	135.2	10	1.20	81

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Winn-Dixie Stores	104
Publix Super Markets	103
Kash N Karry Food Stores	93
Food Lion Stores/Save Rite	31
Albertson's	21

Major discount department stores

Kmart	41
Wal-Mart	34
Marshalls	8
Target	8

Major drug, health & beauty aids stores

Jack Eckerd Corp.	152
Walgreen Co.	83
Rite Aid Corp.	46
Phar-Mor	15
Joel N' Jerry's	7

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 index is the national average).

ClusterPLUS™ category

	% of HHs	Index
Old rural retirees	25.1	1,210
Urban retirees and professionals	8.8	483
Low income single retirees	8.4	715
Highly mobile working couples	7.3	103
Older mobile well educated	6.2	241
Older below average income homeowners	4.2	171
Mobile less educated families	3.9	226
Average income families in SFDUs	3.7	119

DMA household income (1991)

Median HH income	$26,103
Aggregate HH income	$47.47 billion
Median family income	$28,080

Most affluent counties
(by 1991 median HH income)

1. Hillsborough	$29,847
2. Sarasota	$28,624
3. Pinellas	$27,687
4. Manatee	$25,381
5. Polk	$23,919

P. Freund

DMA HH income distribution (1991)

$0-7,499	10.4%
$7,500-9,999	6.6%
$10,000-14,999	10.2%
$15,000-24,999	21.0%
$25,000-34,999	16.0%
$35,000-49,999	16.6%
$50,000-74,999	11.8%
$75,000+	7.3%

Average HH net worth	$219,963
Regional index	127.4
National index	111.2

DMA age distribution 1992

0-5	7.0%
6-13	8.9%
14-17	4.4%
18-24	8.0%
25-34	14.1%
35-44	13.4%
45-54	10.1%
55-64	10.4%
65+	23.2%
Median age	40.25
Median age adult population	48.70

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Hillsborough	+100,594
2. Pinellas	+58,011
3. Sarasota	+39,226
4. Polk	+37,963
5. Pasco	+37,562

Retail sales*

Tampa-St. Petersburg-Clearwater MSA 1991	$23.650 billion
Change from 1990	+4.7%

1992/1991 retail sales trend

April 1992	$1.705 billion, −14.7%
Jan.-April 1992	−14.8%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. MSA is Metropolitan Statistical Area.

Unemployment trends
Unemployment within the Metropolitan Statistical Area in April 1992 was 7.0%. Rates were not reported separately for Tampa, St. Petersburg or Clearwater.
Source: U.S. Labor Department

REASON NUMBER 9 TO READ ADVERTISING AGE: NEWS SUMMARY

Advertising Age
WHERE TAMPA GETS THE WORD
On Marketing

#15 Minneapolis/ St. Paul

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 15

		% U.S.
DMA TV HHs	1,348,880	1.466
DMA population	3,641,300	1.438

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,516.5	100	1.43	100
Total adults	2,654.6	100	1.41	100
Men (18+)	1,281.9	48	1.43	101
Women (18+)	1,372.7	52	1.40	99

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	3,306.8	94	1.61	113
Hispanic	45.7	1	0.20	14
Non-White	209.7	6	0.52	36
Black	94.6	3	0.31	22

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,366.4	100	1.46	100
Owner-occupied	968.2	71	1.61	110
Rented	398.2	29	1.19	81

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	336.7	25	1.47	100
2 members	443.5	32	1.48	101
3 members	224.9	16	1.38	95
4 members	216.7	16	1.53	105
5 members	98.8	7	1.57	108
6+ members	45.7	3	1.16	79

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	249.9	18	1.52	104

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	417.7	31	1.65	113
35-54	520.6	38	1.47	101
55+	428.0	31	1.30	89

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	67.0	5	1.13	78
$5,000-9,999	114.4	8	1.36	93
$10,000-14,999	122.1	9	1.37	94
$15,000-19,999	124.7	9	1.41	97
$20,000-24,999	119.3	9	1.45	99
$25,000+	818.9	60	1.54	105

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	464.4	34	1.40	96
Two or more	774.8	57	1.58	108
No car	127.3	9	1.13	77

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Country Club Market	31
Rainbow Food Stores	28
Erickson's Diversified Corp.	14
Holiday Companies	14
Coborns	11

Major discount department stores

Kmart	32
Pamida	26
Target	24
Wal-Mart	14

Major drug, health & beauty aids stores

Snyder's Drug Stores	44
Walgreen Co.	40
Thrifty-White Drug Stores	24
Snyder Bros. Drug Stores	20
Erickson's Valu Drugs	13
Medicine Shoppe International	11

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category

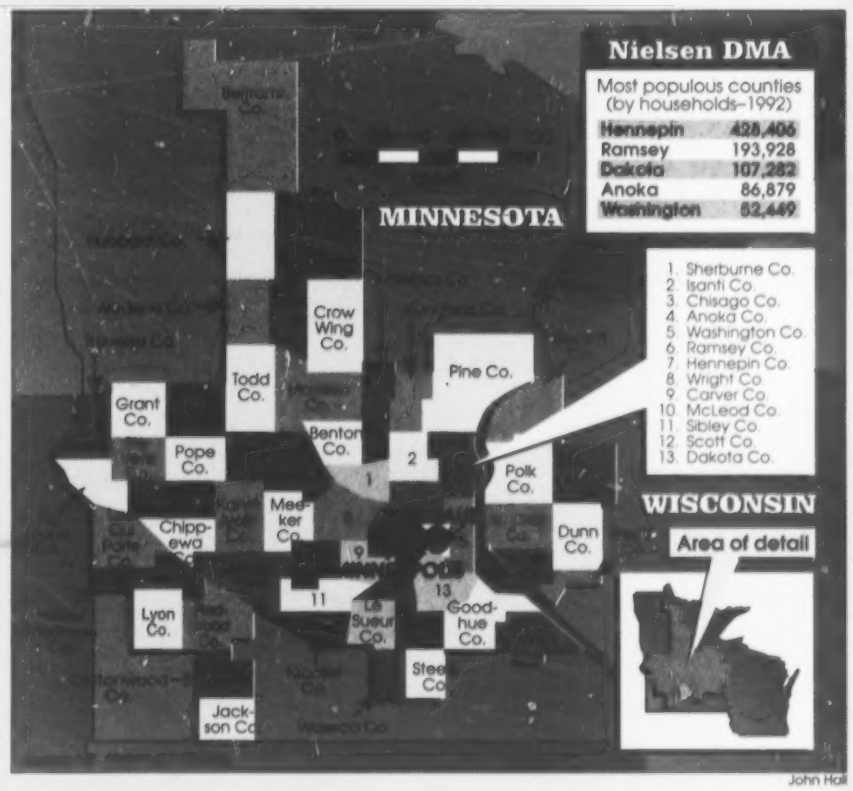
	% of HHs	Index
Highly mobile working couples	7.4	103
Low mobility rural families	5.6	496
Highly mobile young families	5.2	202
Young apartment dwellers	5.2	186
Older non-mobile urban HHs	4.8	188
Young affluents w/children	4.4	156
Rural families w/children	4.3	99
Older low income couples	4.2	314

DMA household income (1991)

Median HH income	$33,433
Aggregate HH income	$56.34 billion
Median family income	$42,488

Most affluent counties
(by 1991 median HH income)

1. Washington	$43,953
2. Dakota	$43,253
3. Scott	$40,205
4. Anoka	$39,486
5. Hennepin	$37,269



John Hall

DMA HH income distribution (1991)

$0-7,499	8.3%
$7,500-9,999	4.9%
$10,000-14,999	7.5%
$15,000-24,999	15.7%
$25,000-34,999	16.1%
$35,000-49,999	19.6%
$50,000-74,999	17.0%
$75,000+	10.9%

Average HH net worth $298,558
Regional index 173.0
National index 151.0

DMA age distribution 1992

0-5	9.3%
6-13	12.0%
14-17	5.5%
18-24	10.1%
25-34	17.4%
35-44	15.9%
45-54	10.4%
55-64	7.4%
65+	11.5%

Median age 32.53
Median age adult population 40.26

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Dakota	+49,513
2. Hennepin	+39,751
3. Anoka	+23,768
4. Washington	+16,951
5. Ramsey	+11,068

Retail sales*
Minneapolis-St. Paul MSA
1991 $19.319 billion
Change from 1990 +3.9%

1992/1991 retail sales trend
April 1992 $1.727 billion, +12.7%
Jan.-April 1992 +12.0%
*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the Minneapolis-St. Paul Metropolitan Statistical Area in April 1992 was 4.3%.
Source: U.S. Labor Department

REASON NUMBER 10 TO READ ADVERTISING AGE:

GREEN

Advertising Age
WHERE MINNEAPOLIS/ST. PAUL GETS THE WORD
On Marketing

#16 Miami/ Fort Lauderdale

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 16

		% U.S.
DMA TV HHs	1,275,990	1.386
DMA population	3,377,800	1.334

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	3,278.8	100	1.34	100
Total adults	2,609.3	100	1.39	100
Men (18+)	1,226.9	47	1.36	98
Women (18+)	1,382.4	53	1.41	102

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,613.3	80	1.28	95
Hispanic	1,119.9	34	4.94	369
Non-White	665.5	20	1.65	123
Black	607.7	19	2.02	151

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,294.6	100	1.38	100
Owner-occupied	779.5	60	1.30	94
Rented	515.1	40	1.54	111

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	348.6	27	1.52	110
2 members	426.5	33	1.42	103
3 members	209.2	16	1.29	93
4 members	168.7	13	1.19	86
5 members	80.1	6	1.27	92
6+ members	61.5	5	1.55	113

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	208.4	16	1.26	91

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	303.9	23	1.20	87
35-54	466.3	36	1.32	95
55+	524.4	41	1.59	115

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	87.9	7	1.48	107
$5,000-9,999	105.4	8	1.25	91
$10,000-14,999	118.6	9	1.33	96
$15,000-19,999	123.1	10	1.39	101
$20,000-24,999	114.4	9	1.39	100
$25,000+	745.2	58	1.40	101

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	571.2	44	1.79	125
Two or more	538.3	42	1.10	79
No car	185.1	14	1.64	118

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Winn-Dixie Stores	107
Publix Super Markets	92
Florida Supermarkets	27
Sedano's Markets	20
Albertson's	8

Major discount department stores

Kmart	25
Marshalls	17
Wal-Mart	6
Costco Wholesale Corp.	4
Target	4

Major drug, health & beauty aids stores

Jack Eckerd Corp.	116
Walgreen Co.	68
Rite Aid Corp.	65
Phar-Mor	10
Melville Corp.	9
Sedano's Pharmacy	9

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

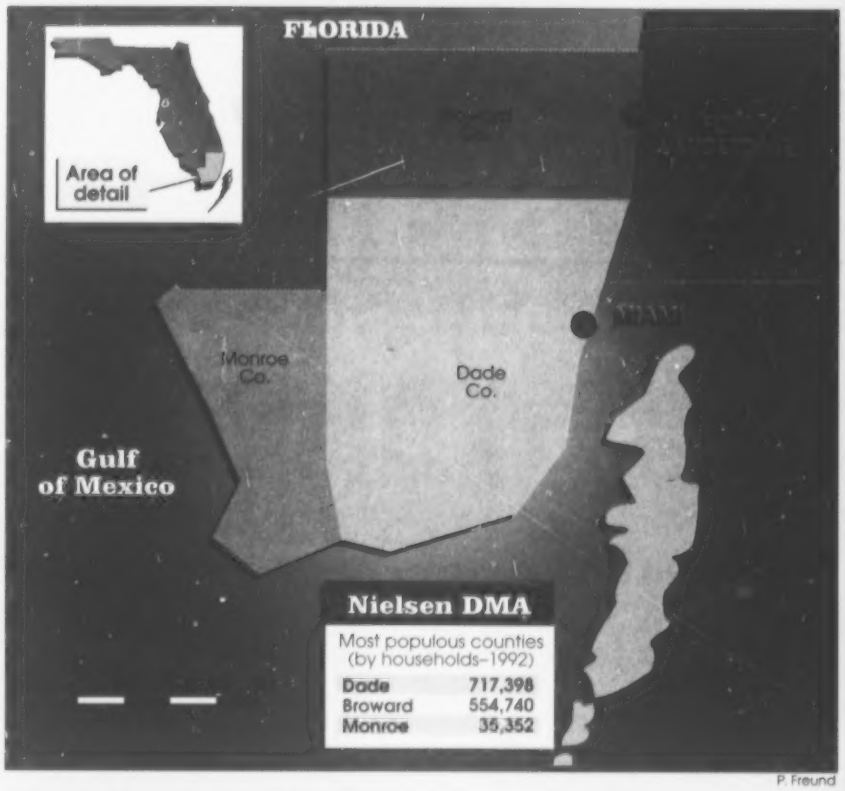
ClusterPLUS™ category	% of HHs	Index
Urban retirees and professionals	18.7	1,027
Middle income Hispanics	12.6	774
Highly mobile working couples	11.7	165
Lowest income Hispanics	4.6	233
Average income families in SFDUs	4.2	137
Old rural retirees	3.7	177
Young affluents w/children	3.6	129
Affluent urban singles	3.1	130
Young urban ethnics	3.1	119
Lowest income urban retirees	3.1	239

DMA household income (1991)

Median HH income	$28,601
Aggregate HH income	$50.12 billion
Median family income	$33,707

Most affluent counties
(by 1991 median HH income)

1. Broward	$30,744
2. Monroe	$27,709
3. Dade	$27,028



P. Freund

DMA HH income distribution (1991)

$0-7,499	11.4%
$7,500-9,999	5.2%
$10,000-14,999	9.5%
$15,000-24,999	18.1%
$25,000-34,999	16.4%
$35,000-49,999	16.5%
$50,000-74,999	13.4%
$75,000+	9.7%

Average HH net worth	$208,356
Regional index	120.0
National index	105.3

DMA age distribution 1992

0-5	7.9%
6-13	9.8%
14-17	4.7%
18-24	8.9%
25-34	16.2%
35-44	15.0%
45-54	11.1%
55-64	9.2%
65+	16.8%
Median age	36.38
Median age adult population	43.92

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Dade	+165,739
2. Broward	+121,020
3. Monroe	+6,899

Retail sales*

Miami-Fort Lauderdale CMSA.	
1991	$25.991 billion
Change from 1990	+0.2%

1992/1991 retail sales trend

April 1992	$2.383 billion, +17.8%
Jan.-April 1992	+13.0%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the Miami-Fort Lauderdale CMSA in April 1992 ranged from 8.0% in the Fort Lauderdale-Hollywood-Pompano Beach Primary Metropolitan Statistical Area to 10.0% in the Miami-Hialeah PMSA.
Source: U.S. Labor Department

REASON NUMBER 11 TO READ ADVERTISING AGE:

MEDIA WORKS

Advertising Age
WHERE MIAMI GETS THE WORD
On Marketing

#17 Pittsburgh

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 17

		% U.S.
DMA TV HHs	1,128,260	1.226
DMA population	2,908,300	1.149

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	2,831.7	100	1.16	100
Total adults	2,251.5	100	1.20	100
Men (18+)	1,044.7	46	1.16	97
Women (18+)	1,206.8	54	1.23	103

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,625.4	93	1.28	111
Hispanic	15.5	1	0.07	6
Non-White	206.3	7	0.51	44
Black	180.3	6	0.60	52

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,142.2	100	1.22	100
Owner-occupied	806.5	71	1.34	110
Rented	335.7	29	1.00	82

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	306.1	27	1.33	109
2 members	371.6	33	1.24	101
3 members	201.0	18	1.24	101
4 members	167.9	15	1.19	97
5 members	68.3	6	1.08	89
6+ members	27.3	2	0.69	57

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	161.7	14	0.98	80

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	251.6	22	0.99	81
35-54	394.1	35	1.11	91
55+	496.5	43	1.51	124

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	73.0	6	1.23	101
$5,000-9,999	119.9	10	1.43	117
$10,000-14,999	115.8	10	1.30	107
$15,000-19,999	109.5	10	1.24	102
$20,000-24,999	104.1	9	1.26	104
$25,000+	619.9	54	1.16	95

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	454.2	40	1.37	112
Two or more	507.1	44	1.03	85
No car	180.9	16	1.60	131

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets	
Giant Eagle	37
Penn Traffic	8
PJ's Retail/Franchise	4
Major discount department stores	
Kmart	31
Hills Dept. Stores	22
Ames Dept. Stores	19
Marshalls	5
Pace Membership Warehouse	4
Major drug, health & beauty aids stores	
Thrift Drug	111
Rite Aid Corp.	65
Medicine Shoppe International	43
Revco D.S.	43
Hook-SuperX	19
Phar-Mor	17

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

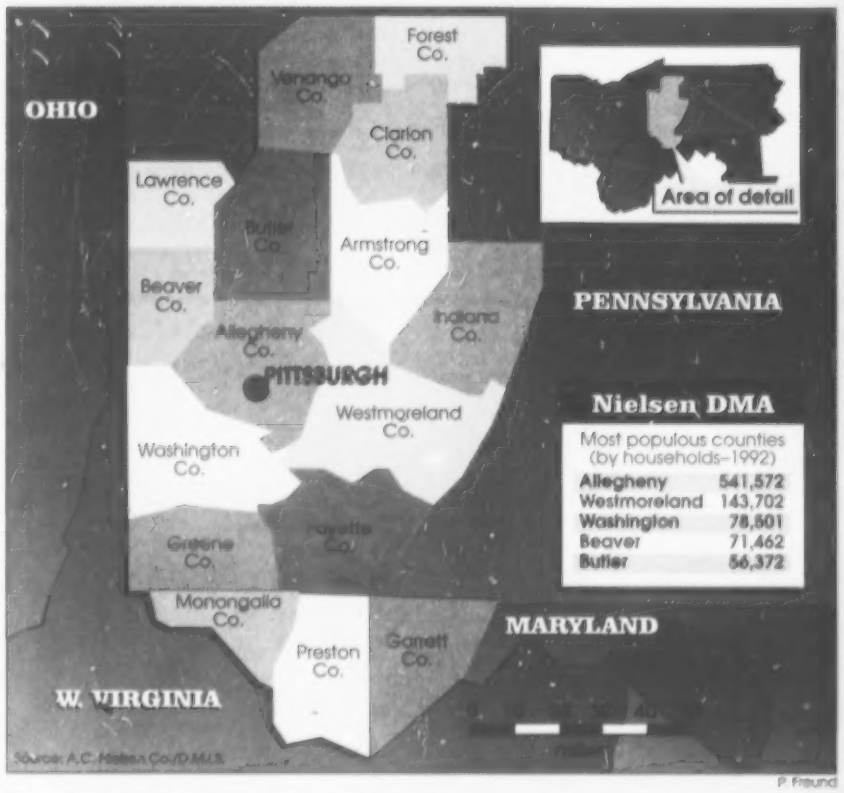
ClusterPLUS™ category	% of HHs	Index
Low income blue collar workers	16.3	766
Rural families w/children	9.1	209
Rural blue collar workers	8.9	396
Older small town HHs	8.3	364
Stable blue collar workers	6.4	338
Rural manufacturing workers	4.3	262
Lowest income retirees-old homes	4.1	370
Older non-mobile urban HHs	4.0	157
Urban working families	3.3	137
Non-urban working families	2.7	91

DMA household income (1991)

Median HH income	$28,423
Aggregate HH income	$40.41 billion
Median family income	$34,534

Most affluent counties
(by 1991 median HH income)

1. Allegheny (Pa.)	$30,954
2. Butler (Pa.)	$29,772
3. Beaver (Pa.)	$28,258
4. Westmoreland (Pa.)	$28,114
5. Washington (Pa.)	$27,813



P. Freund

DMA HH income distribution (1991)

$0-7,499	11.6%
$7,500-9,999	5.1%
$10,000-14,999	9.4%
$15,000-24,999	17.9%
$25,000-34,999	17.8%
$35,000-49,999	17.0%
$50,000-74,999	12.9%
$75,000+	8.4%
Average HH net worth	$212,119
Regional index	100.1
National index	107.2

DMA age distribution 1992

0-5	7.3%
6-13	9.8%
14-17	5.3%
18-24	9.8%
25-34	14.6%
35-44	14.9%
45-54	10.8%
55-64	10.0%
65+	17.1%
Median age	36.94
Median age adult population	44.51

County growth forecasts
Counties forecast to have the largest population gains/smallest losses 1992-1997.

1. Garrett (Md.)	+587
2. Butler (Pa.)	+537
3. Monongalia (W.Va.)	–95
4. Forest (Pa.)	–196
5. Greene (Pa.)	–585

Retail sales*

Pittsburgh-Beaver Valley CMSA	
1991	$15.291 billion
Change from 1990	+3.1%

1992/1991 retail sales trend

April 1992	$1.272 billion,	+3.8%
Jan.-April 1992		+1.4%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. CMSA is Consolidated Metropolitan Statistical Area.

Unemployment trends
Unemployment within the CMSA in April 1992 ranged from 7.1% in the Pittsburgh Primary Metropolitan Statistical Area to 10.5% in the Beaver County PMSA.
Source: U.S. Labor Department

— We Deliver The Other Pittsburgh —

PITTSBURGH ADI NEWSPAPER NETWORK

- Beaver County Times, Pa.
- Butler Eagle, Pa.
- Ellwood City Ledger, Pa.
- Indiana Gazette, Pa.
- Irwin Standard-Observer, Pa.
- Latrobe Bulletin, Pa.
- McKeesport Daily News, Pa.
- Uniontown Herald-Standard, Pa.
- Washington Observer-Reporter, Pa.
- Greensburg Tribune-Review, Pa.
- Morgantown Dominion Post, W. Va.

290,936 The Audit Bureau TOTAL DAILY CIRCULATION

RATE $170.87 per inch

ONE RATE / ONE BILL

Our 28th Year

THE PITTSBURGH AREA pamm MAJOR MARKET DAILY NEWSPAPER NETWORK

- Beaver County Times
- Butler Eagle
- Greensburg Tribune-Review
- McKeesport Daily News
- Irwin Standard-Observer
- Uniontown Herald-Standard
- Washington Observer-Reporter

234,885 The Audit Bureau TOTAL DAILY CIRCULATION

RATE $131.36 per inch

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#18 St. Louis

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 18

		% U.S.
DMA TV HHs	1,093,750	1.188
DMA population	2,936,100	1.160

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	2,842.5	100	1.16	100
Total adults	2,157.0	100	1.15	100
Men (18+)	1,011.7	47	1.13	98
Women (18+)	1,145.3	53	1.17	102

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,387.9	84	1.17	101
Hispanic	28.1	1	0.12	11
Non-White	454.6	16	1.13	97
Black	420.2	15	1.40	121

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,109.5	100	1.18	100
Owner-occupied	777.5	70	1.29	109
Rented	332.0	30	0.99	84

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	282.3	25	1.23	104
2 members	348.2	31	1.16	98
3 members	193.6	17	1.19	100
4 members	169.9	15	1.20	102
5 members	75.6	7	1.20	101
6+ members	39.9	4	1.01	85

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	194.5	18	1.18	100

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	291.0	26	1.15	97
35-54	408.3	37	1.15	97
55+	410.2	37	1.25	105

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	61.9	6	1.04	88
$5,000-9,999	94.5	9	1.12	95
$10,000-14,999	100.4	9	1.13	95
$15,000-19,999	98.4	9	1.11	94
$20,000-24,999	94.0	8	1.14	96
$25,000+	660.3	60	1.24	105

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	381.4	34	1.15	97
Two or more	607.4	55	1.24	104
No car	120.7	11	1.07	90

Major retail outlets 1991

Chains with largest number of stores in the market.

Supermarkets

Schnuck Markets	53
National Super Markets	52
Wetterau	23
Aldi	15
Dierbergs Markets	14

Major discount department stores

Wal-Mart	50
Kmart	24
Venture	15
Grandpa's	9

Major drug, health & beauty aids stores

Walgreen Co.	61
Kare Drugs	51
Medicine Shoppe International	27
Hook-SuperX	15
Medi-Save Pharmacies	9
Rinderer Drug	7

ClusterPLUS™ lifestyles/demographics

Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

ClusterPLUS™ category	% of HHs	Index
Highly mobile working couples	5.5	77
Small town families	5.2	211
Older below average income homeowners	5.0	206
Rural families w/children	4.7	109
Young affluents w/children	3.7	134
Highly mobile young families	3.6	139
Small town apartment dwellers	3.5	189
Rural manufacturing workers	3.5	219

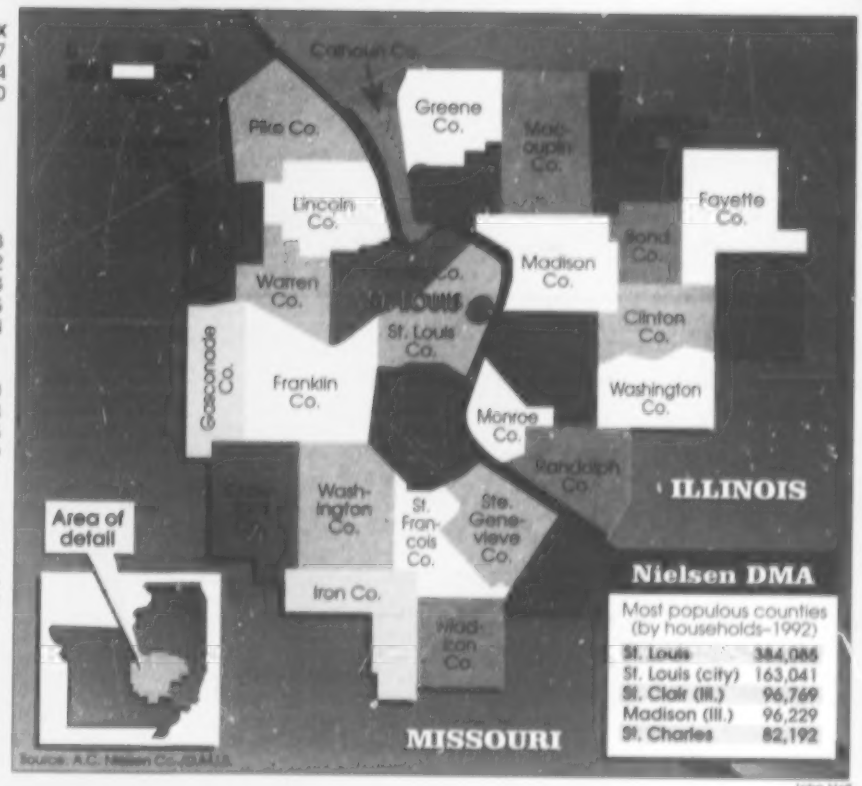
DMA household income (1991)

Median HH income	$31,501
Aggregate HH income	$43.05 billion
Median family income	$38,736

Most affluent counties

(by 1991 median HH income)

1. St. Louis (Mo.)	$41,537
2. St. Charles (Mo.)	$41,525
3. Monroe (Ill.)	$34,496
4. Jefferson Co. (Mo.)	$33,270
5. Madison Co. (Ill.)	$30,098



John Hall

DMA HH income distribution (1991)

$0-7,499	9.7%
$7,500-9,999	5.0%
$10,000-14,999	8.4%
$15,000-24,999	16.1%
$25,000-34,999	16.7%
$35,000-49,999	19.1%
$50,000-74,999	15.3%
$75,000+	9.8%

Average HH net worth	$250,711
Regional index	143.9
National index	126.8

DMA age distribution 1992

0-5	8.8%
6-13	11.6%
14-17	5.5%
18-24	9.4%
25-34	16.0%
35-44	15.1%
45-54	10.7%
55-64	8.7%
65+	13.6%
Median age	34.03
Median age adult population	42.33

County growth forecasts

Counties forecast to have the largest population gains 1992-1997.

1. St. Charles (Mo.)	+44,143
2. Jefferson (Mo.)	+12,372
3. Franklin (Mo.)	+4,301
4. Lincoln (Mo.)	+4,157
5. St. Francois	+2,810

Retail sales*

St. Louis MSA, 1991	$18.939 billion
Change from 1990	+0.9%

1992/1991 retail sales trend

April 1992	$1.595 billion, −1.5%
Jan.-April 1992	+0.3%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. MSA is Metropolitan Statistical Area.

Unemployment trends

Unemployment within the St. Louis Metropolitan Statistical Area in April 1992 was 5.7%.

Source: U.S. Labor Department

REASON NUMBER 16 TO READ ADVERTISING AGE: NEW CAMPAIGNS

Advertising Age
WHERE ST. LOUIS GETS THE WORD
On Marketing

#19 Sacramento/ Stockton/Modesto

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 19

		% U.S.
DMA TV HHs	1,054,160	1.145
DMA population	2,996,300	1.183

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	2,890.6	100	1.18	100
Total adults	2,165.5	100	1.15	100
Men (18+)	1,063.0	49	1.18	103
Women (18+)	1,102.5	51	1.13	98

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,411.8	83	1.18	100
Hispanic	436.7	15	1.93	163
Non-White	478.8	17	1.19	101
Black	179.5	6	0.60	51

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,075.1	100	1.15	100
Owner-occupied	644.2	60	1.07	93
Rented	430.9	40	1.28	112

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	240.9	22	1.05	91
2 members	357.0	33	1.19	104
3 members	185.0	17	1.14	99
4 members	163.1	15	1.16	101
5 members	74.3	7	1.18	103
6+ members	54.9	5	1.39	121

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	215.0	20	1.30	114

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	306.8	29	1.21	105
35-54	421.4	39	1.19	104
55+	347.0	32	1.05	92

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	55.6	5	0.94	82
$5,000-9,999	90.5	8	1.08	94
$10,000-14,999	100.2	9	1.13	98
$15,000-19,999	102.3	10	1.16	101
$20,000-24,999	93.4	9	1.13	99
$25,000+	633.1	59	1.19	103

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	362.3	34	1.09	95
Two or more	627.5	58	1.28	111
No car	85.3	8	0.75	66

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets	
Lucky Stores	52
Safeway Stores	35
Raleys	33
Save Mart Stores	27
Albertson's	18
Major discount department stores	
Kmart	28
Target	15
Marshalls	7
Costco Wholesale Corp.	3
The Price Co.	3
Wal-Mart	3
Major drug, health & beauty aids stores	
Thrifty Corp.	59
Long's Drug Stores	38
Pay Less Drug Stores	38
Medicine Shoppe International	9
Green Brothers Pharmacies	4

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

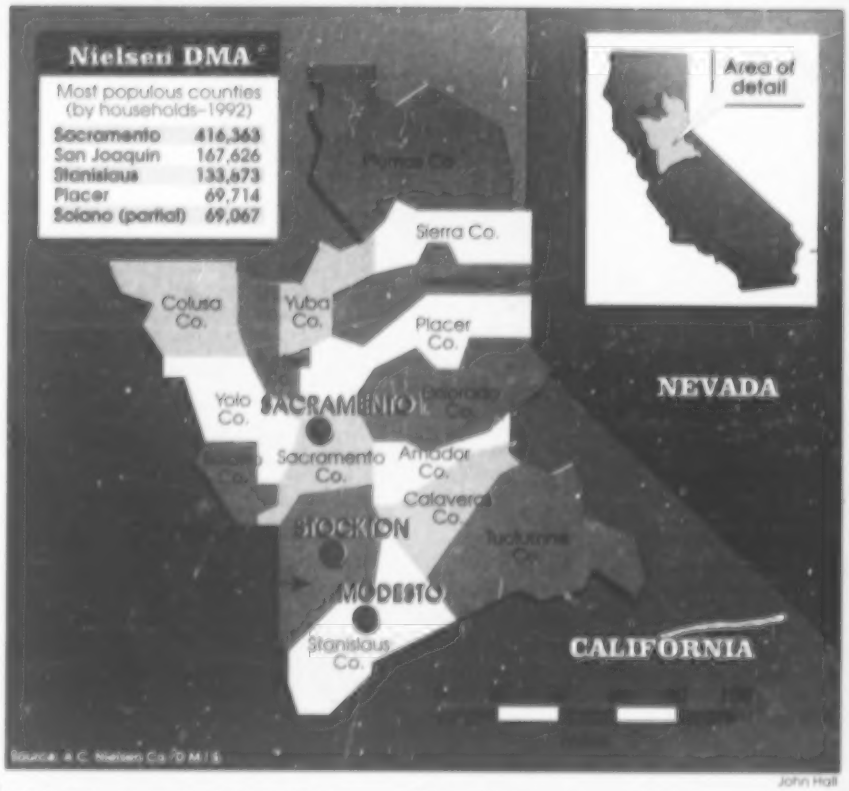
ClusterPLUS™ category	% of HHs	Index
Highly mobile working couples	21.7	305
Average income families in SFDUs	8.3	269
Old rural retirees	6.1	292
Young urban ethnics	5.4	209
Young apartment dwellers	4.8	171
Non urban working families	4.1	137
Highly mobile young families	3.5	135
Lowest income Hispanics	3.4	172

DMA household income (1991)

Median HH income	$30,553
Aggregate HH income	$39.79 billion
Median family income	$36,197

Most affluent counties
(by 1991 median HH income)

1. Solano	$36,859
2. Placer	$34,358
3. El Dorado	$33,707
4. Nevada	$31,552
5. Sacramento	$31,345



Source: A.C. Nielsen Co. DMA 6

John Hall

DMA HH income distribution (1991)

$0-7,499	9.3%
$7,500-9,999	5.6%
$10,000-14,999	8.9%
$15,000-24,999	17.5%
$25,000-34,999	15.7%
$35,000-49,999	18.3%
$50,000-74,999	15.1%
$75,000+	9.7%

Average HH net worth	$281,083
Regional index	108.9
National index	142.1

DMA age distribution 1992

0-5	9.6%
6-13	12.3%
14-17	5.6%
18-24	10.0%
25-34	16.5%
35-44	16.0%
45-54	10.5%
55-64	7.7%
65+	11.3%
Median age	32.54
Median age adult population	40.70

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Sacramento	+145,478
2. San Joaquin	+80,809
3. Stanislaus	+64,351
4. Solano	+36,851
5. Placer	+34,486

Retail sales*
U.S. Commerce Dept. estimates of retail sales are not available for metros within this market. Total taxable sales for key metro counties, as reported by the California State Board of Equalization, for 1991 (and percent change from 1990) are show below.

Sacramento	$10.13 billion, -2.8%
San Joaquin (Stockton)	$3.64 billion, -4.3%
Stanislaus (Modesto)	$3.22 billion, -3.4%

Unemployment trends
Unemployment within the DMA in April 1992 ranged from 7.8% in the Sacramento Primary MSA to 14.7% in the Stockton PMSA to 17.4% in the Modesto PMSA.
Source: U.S. Labor Department

Reason Number 12 To Read Advertising Age: ONE ON ONE

Advertising Age
On Marketing

#20 Phoenix

A.C. Nielsen Co. Data Profile

DMA rank (by TV HHs, Jan. '92): No. 20

		% U.S.
DMA TV HHs	1,043,850	1.134
DMA population	2,848,500	1.125

DMA population segments

	(000)	%DMA	%U.S.	Index
Age 2+	2,749.6	100	1.12	100
Total adults	2,079.9	100	1.11	100
Men (18+)	1,014.2	49	1.13	102
Women (18+)	1,065.7	51	1.09	98

DMA population (age 2+) by race

	(000)	%DMA	%U.S.	Index
White	2,464.4	90	1.20	107
Hispanic	431.2	16	1.90	170
Non-White	285.2	10	0.71	63
Black	85.6	3	0.28	25

DMA households

	(000)	%DMA	%U.S.	Index
Total	1,067.8	100	1.14	100
Owner-occupied	688.6	64	1.15	100
Rented	379.2	36	1.13	99

DMA HHs by HH size

	(000)	%DMA	%U.S.	Index
1 member	259.2	24	1.13	99
2 members	376.1	35	1.25	110
3 members	166.0	16	1.02	89
4 members	142.9	13	1.01	89
5 members	69.4	6	1.10	97
6+ members	54.3	5	1.37	120

HHs with infants/preschoolers

	(000)	%DMA	%U.S.	Index
0 to age 5	191.2	18	1.16	102

HHs by age of head of HH

	(000)	%DMA	%U.S.	Index
Under 35	313.6	29	1.24	108
35-54	386.6	36	1.09	96
55+	367.7	34	1.12	98

HHs by disposable income

	(000)	%DMA	%U.S.	Index
$0-4,999	65.0	6	1.10	96
$5,000-9,999	88.8	8	1.06	93
$10,000-14,999	104.9	10	1.18	103
$15,000-19,999	110.2	10	1.25	109
$20,000-24,999	100.6	9	1.22	107
$25,000+	598.3	56	1.12	98

HHs by car availability

	(000)	%DMA	%U.S.	Index
One car	391.9	37	1.18	104
Two or more	609.4	57	1.24	109
No car	66.5	6	0.59	52

Major retail outlets 1991
Chains with largest number of stores in the market.

Supermarkets

Safeway Stores	64
Abco Markets	54
Bashas Markets	52
Kroger	34
Smitty's Super Valu	25

Major discount department stores

Kmart	25
Smitty's	21
Wal-Mart	14
Target	11

Major drug, health & beauty aids stores

RDS	76
Walgreen Co.	62
American Drug Stores	29
Thrifty Corp.	22
Revco D.S.	18

ClusterPLUS™ lifestyles/demographics
Largest lifestyle and demographic segments by percent of total HHs in DMA indexed to the national average (a national household index of 100 is the national average).

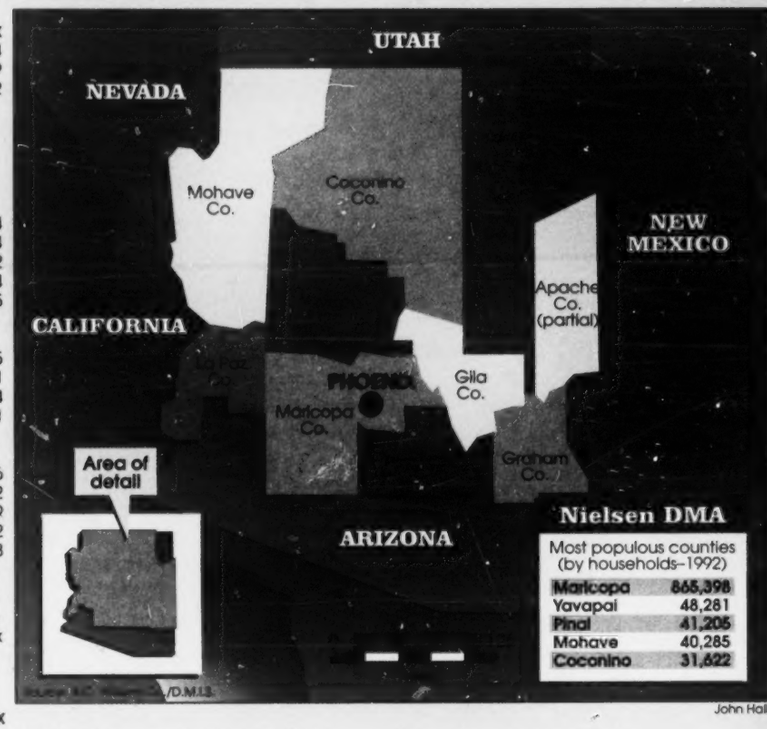
ClusterPLUS™ category	% of HHs	Index
Highly mobile working couples	16.9	238
Old rural retirees	13.4	644
Highly mobile young families	10.8	423
Mobile less educated families	5.4	313
Young urban ethnics	5.0	193
Young affluents w/children	4.4	157
Urban retirees and professionals	4.3	238
Lowest income Hispanics	3.8	192
Average income families in SFDUs	3.6	115

DMA household income (1991)

Median HH income	$31,486
Aggregate HH income	$41.31 billion
Median family income	$36,038

Most affluent counties
(by 1991 median HH income)

1. Maricopa	$33,254
2. Coconino	$31,944
3. Greenlee	$28,524
4. Navajo	$24,803
5. Mohave	$23,734



John Hall

DMA HH income distribution (1991)

$0-7,499	8.5%
$7,500-9,999	4.9%
$10,000-14,999	8.4%
$15,000-24,999	17.5%
$25,000-34,999	16.4%
$35,000-49,999	18.8%
$50,000-74,999	15.2%
$75,000+	10.3%

Average HH net worth	$265,787
Regional index	106.9
National index	134.4

DMA age distribution 1992

0-5	9.4%
6-13	11.7%
14-17	5.6%
18-24	10.2%
25-34	16.7%
35-44	14.8%
45-54	10.1%
55-64	8.0%
65+	13.1%
Median age	32.78
Median age adult population	41.27

County growth forecasts
Counties forecast to have the largest population gains 1992-1997.

1. Maricopa	+364,072
2. Mohave	+19,795
3. Yavapai	+18,764
4. Pinal	+12,491
5. Coconino	+11,704

Retail sales*
Phoenix MSA

1991	$15.543 billion
Change from 1990	−0.4%

1992/1991 retail sales trend

April 1992	$1.481 billion, +14.0%
Jan.-April 1992	+13.2%

*Estimated retail sales, not seasonally adjusted, U.S. Commerce Department. MSA is Metropolitan Statistical Area.

Unemployment trends
Unemployment within the Phoenix Metropolitan Statistical Area in April 1992 was 6.5%.
Source: U.S. Labor Department

REASON NUMBER 17 TO READ ADVERTISING AGE:

Advertising Age
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On Marketing

100 LEADING MEDIA COMPANIES

Time Warner new No. 1 as double whammy hits hard

By R. Craig Endicott

Growth in cable TV enabled Time Warner to supplant Capital Cities/ABC as the nation's leading media company in 1991, with media revenues of $5.23 billion, up 5.3%.

The tally, exclusive of non-media operations such as Warner Bros., syndication sales, and record and book publishing, included a slight decline in magazines that was more than offset by a 9.4% boost in cable, according to *Advertising Age's* charting of the nation's 100 Leading Media Companies.

Time Warner's media mix in fact represented the only two media among the Top 100 to show growth in revenue in 1991.

Capital Cities/ABC wasn't so fortunate: Its media total declined 0.06%. Cable, too, was its high point, rising 9.6% while revenues for its remaining media categories were declining.

Among the Top 100, total media revenues grew 0.5% to $74.8 billion in 1991, and followed a 6% advance in 1990. Media growth in 1991 was at the lowest level recorded by *Ad Age* in the 12 years it has been monitoring the players.

The war in the Persian Gulf and the deepening economic recession were universally cited by the companies as the key elements in a weakened advertising market.

Only two out of the 10 media tracked by LNA/Arbitron Multi-Media Service grew in ad volume in 1991—syndicated TV and cable networks. Little wonder that revenues from 48 of the Top 100 slipped below 1990 levels.

The price of admission to the Top 100 even dropped in 1991, to $144.4 million in revenues by newcomer Westwood One, compared with $149.3 million from 1990's No. 100 Park Communications, which slid to No. 103.

Newspapers and TV—the former still the largest media contributor—each declined 4.1% in revenue to $23.1 billion and $15.4 billion, respectively. Newspapers slipped 0.1% last year, extending the medium's slump to two years. TV had grown 4.2% in revenue in 1990.

Cap Cities slips to second; war, economy drag down revenues for '91 media leaders

Radio dipped 0.7% to $1.4 billion after a 20.2% gain in 1990. Magazines edged upward 0.5% to $12.7 billion compared with a 6.3% growth in 1990. The "other" category, dominated by free standing insert business, news services, outdoor and emerging-but-less-traditional forms of media, pushed ahead 6.6% to $4.2 billion.

Gordon Swanson/The Image Bank

Cable was the media industry lifesaver. Cable properties grew to $18 billion, up 11% compared with 18.1% growth in 1990. Time Warner led all cable contributors in revenue volume at $3.3 billion. Some 57% of that was generated by Time Warner Cable (ATC and Warner Cable) and the rest by Home Box Office.

No Top 100 company that drew more than 35% of its media total from cable showed a year-to-year decline in total media. All cable units of the 37 companies with cable advanced in revenue.

Cable companies leapfrogged others in the ranking. Apart from Time Warner's newfound claim on the top spot, Tele-Communications Inc. vaulted from No. 7 a year ago to No. 4. Viacom International moved up two slots to No. 15, and Turner Broadcasting System and Continental Cablevision, each advanced a rung to No. 18 and No. 20, respectively.

A change in *Ad Age* methodology now allows joint ventures to stand on their own and not be portioned into their respective parents. This paved the way for three new members.

They include No. 55 USA Network, a 50/50 venture of No. 65 Paramount Communications and Matsushita Electric Industrial Co. (through its MCA Inc. unit); No. 58 Paragon Communications, a venture of Time Warner and No. 75 Houston Industries; and No. 87 King Broadcasting Co., half owned each by No. 69 Providence Journal Co. and investment partner Kelso & Co.

Apart from outright ownership by another media company, several companies are under the imprint of Top 100 media moguls. Both No. 48 Landmark Communications and No. 72 TeleCable Corp. have Frank Batten as chairman. TeleCable was spun off from Landmark in the mid-1980s. Gaylord Entertainment Co., No. 49, shares Chairman Edward L. Gaylord with Oklahoma Publishing Co. (Opubco), a Top 100 member until this year.

Opubco formed GEC last year by spinning off four TV stations and The Nashville Network, the two media segments of GEC. Opubco fell from the Top 100 because returns from its sole remaining media property, the *Daily Oklahoman*, fell short of the cutoff.

Slipping from last year's ranking were Edgell Communications (now called Advanstar Communications), which emerged this January from Chapter 11 bankruptcy protection with fewer media properties; Family Media, which dissolved last August; Times Journal Co., sold to Gannett Co., which held it for only four months before selling the Journal newspaper division at yearend; and Pittway Corp. and Park, both hurt by the depressed economy.

Poised to exit the Top 100 is No. 89 Pinelands. Chris-Craft Industries, No. 68, recently bid $310 million for its sole property, superstation WWOR-TV in Secaucus, N.J.

Ownership of the lone remaining media property of No. 84 Maxwell Communication Corp., the New York *Daily News*, is being sought by Mortimer B. Zuckerman, owner of No. 86 U.S. News & World Report, and Conrad M. Black, head of Hollinger Inc.

A Hollinger victory would secure its American Publishing Inc. subsidiary, comprised of a growing list of more than 80 U.S. newspapers, a spot on the elite 100. Hollinger barely finished out of the running this year at No. 101 based on $141.2 million in revenues. □

100 leading media companies by revenue

Rank 1991	Rank 1990	Company, U.S. headquarters	Total media revenue 1991	Total media revenue 1990	% chg	Newspaper revenue 1991	Newspaper revenue 1990	Magazine revenue 1991	Magazine revenue 1990	Broadcast* revenue 1991	Broadcast* revenue 1990	Cable TV revenue 1991	Cable TV revenue 1990	Other media revenue 1991	Other media revenue 1990
1	2	**Time Warner**, New York	$5,229.0	$4,964.8	5.3	—	—	$1,928.0	$1,947.8	—	—	$3,301.0	$3,017.0	—	—
2	1	**Capital Cities/ABC**, New York	5,172.0	5,175.0	-0.1	$521.3	$524.2	321.0	367.2	$3,712.0	$3,724.0	489.4	446.0	$128.3	$113.6
3	3	**Gannett Co.**, Arlington, Va.	3,382.0	3,441.6	-1.7	2,629.6	2,647.9	—	—	360.1	396.7	—	—	392.1	397.0
4	7	**Tele-Communications Inc.**, Denver	3,206.0	2,942.0	9.0	—	—	—	—	—	—	3,206.0	2,942.0	—	—
5	5	**General Electric Co.**, Fairfield, Conn.	3,153.5	3,236.0	-2.5	—	—	—	—	3,086.0	3,202.9	67.5	33.1	—	—
6	4	**CBS Inc.**, New York	3,035.0	3,261.2	-6.9	—	—	—	—	3,035.0	3,261.2	—	—	—	—
7	6	**Advance Publications**, Newark, N.J.	3,013.0	3,039.6	-0.9	1,714.0	1,797.0	859.0	845.0	—	—	440.0	397.6	—	—
8	8	**Times Mirror Co.**, Los Angeles	2,763.3	2,855.2	-3.2	1,973.8	2,066.0	291.5	313.4	94.2	104.5	403.8	371.3	—	—
9	9	**News Corp.**, Sydney	2,278.0	2,363.6	-3.6	164.0	174.4	575.0	707.3	964.0	964.0	—	—	575.0	517.9
10	10	**Knight-Ridder**, Miami	1,953.8	2,040.0	-4.2	1,953.8	2,040.0	—	—	—	—	—	—	—	—
11	11	**Hearst Corp.**, New York	1,947.2	2,022.2	-3.7	680.0	715.0	1,002.0	1,022.0	265.2	285.2	—	—	—	—
12	14	**Cox Enterprises**, Atlanta	1,716.0	1,700.0	0.9	709.0	731.8	2.0	2.0	409.0	419.1	596.0	547.0	—	—
13	12	**New York Times Co.**, New York	1,703.1	1,776.8	-4.1	1,274.4	1,358.3	352.7	340.0	66.5	69.0	—	—	9.5	9.5
14	13	**Tribune Co.**, Chicago	1,636.6	1,703.0	-3.9	1,141.6	1,196.7	—	—	495.0	506.3	—	—	—	—
15	17	**Viacom International**, New York	1,459.3	1,337.5	9.1	—	—	—	—	159.1	164.0	1,300.2	1,173.5	—	—
16	15	**Thomson Corp.**, Toronto	1,419.6	1,404.0	1.1	645.2	654.0	774.4	750.0	—	—	—	—	—	—
17	16	**Washington Post Co.**, Washington	1,292.2	1,356.1	-4.7	642.7	691.0	326.5	340.2	163.5	179.4	159.5	145.5	—	—
18	19	**Turner Broadcasting System**, Atlanta	1,190.7	1,069.1	11.4	—	—	—	—	—	—	1,190.7	1,069.1	—	—
19	18	**E.W. Scripps**, Cincinnati	1,161.6	1,147.4	1.2	691.0	712.4	—	—	245.4	235.6	225.2	199.4	—	—
20	21	**Continental Cablevision**, Boston	1,127.0	938.0	20.1	—	—	—	—	—	—	1,127.0	938.0	—	—
21	22	**Reed International**, Newton, Mass.	1,015.3	804.0	26.3	—	—	760.0	624.0	—	—	—	—	255.3	180.0
22	20	**Dow Jones & Co.**, New York	963.1	983.7	-2.1	963.1	983.7	—	—	—	—	—	—	—	—
23	24	**Reader's Digest Association**, Pleasantville, N.Y.	729.2	681.4	7.0	—	—	729.2	681.4	—	—	—	—	—	—
24	25	**Advo Inc.**, Windsor, Conn.	697.4	655.0	6.5	—	—	—	—	—	—	—	—	697.4	655.0
25	23	**Westinghouse Electric Corp.**, Pittsburgh	673.0	704.0	-4.4	—	—	—	—	673.0	704.0	—	—	—	—
26	28	**Comcast Corp.**, Bala-Cynwyd, Pa.	647.1	585.7	10.5	—	—	—	—	—	—	647.1	585.7	—	—
27	29	**Valassis Communications**, Livonia, Mich.	635.7	570.7	11.4	—	—	—	—	—	—	—	—	635.7	570.7
28	33	**International Data Group**, Framingham, Mass.	627.0	528.0	18.8	—	—	627.0	528.0	—	—	—	—	—	—
29	31	**SCI Holdings**, Miami	606.7	553.1	9.7	—	—	—	—	—	—	606.7	553.1	—	—
30	30	**Cablevision Systems Corp.**, Woodbury, N.Y.	603.3	563.0	7.2	—	—	—	—	—	—	603.3	563.0	—	—
31	32	**Meredith Corp.**, Des Moines, Iowa	550.8	543.8	1.3	—	—	441.7	432.0	109.1	111.8	—	—	—	—
32	27	**McGraw-Hill**, New York	546.1	589.0	-7.3	—	—	448.0	485.0	98.1	104.0	—	—	—	—
33	26	**Media News Group**, Houston	500.0	600.0	-16.7	500.0	600.0	—	—	—	—	—	—	—	—
34	35	**Freedom Newspapers**, Irvine, Calif.	462.0	485.0	-4.7	382.0	400.0	—	—	80.0	85.0	—	—	—	—
35	36	**Media General**, Richmond, Va.	460.4	458.1	0.5	299.2	302.8	1.6	1.9	52.3	56.8	107.3	96.6	—	—
36	48	**Ziff Communications**, New York	436.0	363.0	20.1	—	—	436.0	363.0	—	—	—	—	—	—
37	38	**A.H. Belo Corp.**, Dallas	431.6	439.1	-1.7	249.7	246.5	—	—	181.9	192.6	—	—	—	—
38	40	**Reuters Holdings**, London	427.1	419.0	1.9	—	—	—	—	—	—	—	—	427.1	419.0
39	37	**Chronicle Publishing Co.**, San Francisco	425.0	440.0	-3.4	235.0	248.0	—	—	98.0	108.0	92.0	84.0	—	—
40	39	**Central Newspapers**, Indianapolis	420.4	431.7	-2.6	420.4	431.7	—	—	—	—	—	—	—	—
41	44	**Multimedia Inc.**, Greenville, S.C.	415.1	390.6	6.3	129.0	135.3	—	—	150.6	134.8	135.5	120.5	—	—
42	41	**McClatchy Newspapers**, Sacramento, Calif.	412.1	405.9	1.5	412.1	405.9	—	—	—	—	—	—	—	—
43	43	**Pulitzer Publishing Co.**, St. Louis	393.4	402.8	-2.3	284.4	287.3	—	—	109.0	115.5	—	—	—	—
44	34	**Affiliated Publications**, Boston	392.8	510.2	-23.0	392.8	416.0	—	94.2	—	—	—	—	—	—
45	46	**Hachette Publications**, Paris	389.0	387.0	0.5	—	—	389.0	387.0	—	—	—	—	—	—
46	42	**Copley Newspapers**, La Jolla, Calif.	386.5	405.2	-4.6	386.5	405.2	—	—	—	—	—	—	—	—
47	49	**K-III Holdings**, New York	376.4	361.9	4.0	73.6	70.0	302.8	291.9	—	—	—	—	—	—
48	47	**Landmark Communications**, Norfolk, Va.	367.4	370.3	-0.8	279.0	292.0	9.2	10.3	19.5	15.5	59.7	52.5	—	—
49	50	**Gaylord Entertainment Co.**, Nashville, Tenn.	360.9	344.5	4.8	—	—	—	—	138.4	160.0	222.5	184.5	—	—
50	57	**Cablevision Industries Corp.**, Liberty, N.Y.	334.7	299.4	11.8	—	—	—	—	—	—	334.7	299.4	—	—
51	55	**Associated Press**, New York	328.9	311.9	5.5	—	—	—	—	—	—	—	—	328.9	311.9
52	53	**Journal Register Co.**, Princeton, N.J.	325.0	323.0	0.6	325.0	323.0	—	—	—	—	—	—	—	—
53	52	**Donrey Media Group**, Fort Smith, Ark.	319.1	323.6	-1.4	237.0	245.0	—	—	9.9	10.3	15.2	14.0	57.0	54.3
54	51	**Harte-Hanks Communications**, San Antonio, Texas	318.7	334.9	-4.8	292.1	306.5	—	—	26.6	28.4	—	—	—	—
55	64	**USA Network**, New York	315.0	267.0	18.0	—	—	—	—	—	—	315.0	267.0	—	—
56	56	**Cowles Media Co.**, Minneapolis	303.6	307.6	-1.3	244.9	251.2	58.7	56.4	—	—	—	—	—	—
57	62	**Sammons Communications**, Dallas	284.6	268.5	6.0	—	—	—	—	—	—	284.6	268.5	—	—
58	67	**Paragon Communications**, Stamford, Conn.	284.0	254.0	11.8	—	—	—	—	—	—	284.0	254.0	—	—
59	58	**Journal Communications**, Milwaukee	281.6	289.0	-2.6	229.5	232.5	—	—	52.1	56.5	—	—	—	—
60	59	**National Geographic Society**, Washington	279.7	279.6	0.0	—	—	279.7	279.6	—	—	—	—	—	—
61	63	**Lee Enterprises**, Davenport, Iowa	277.3	267.8	3.6	207.6	196.5	—	—	69.7	71.3	—	—	—	—
62	68	**Adelphia Communications Corp.**, Coudersport, Pa.	276.7	250.2	10.6	—	—	—	—	—	—	276.7	250.2	—	—
63	45	**Gillett Holdings**, Denver	275.6	390.0	-29.3	—	—	—	—	275.6	390.0	—	—	—	—
64	71	**Enquirer/Star Group**, Lantana, Fla.	275.2	235.8	16.7	—	—	275.2	235.8	—	—	—	—	—	—
65	76	**Paramount Communications**, New York	270.3	222.0	21.8	—	—	—	—	184.6	145.0	85.7	77.0	—	—
66	61	**Morris Communications**, Augusta, Ga.	267.0	273.0	-2.2	267.0	273.0	—	—	—	—	—	—	—	—
67	65	**3M**, St. Paul, Minn.	265.0	265.0	0.0	—	—	—	—	—	—	—	—	265.0	265.0
68	60	**Chris-Craft Industries**, New York	262.6	278.1	-5.6	—	—	—	—	262.6	278.1	—	—	—	—
69	66	**Providence Journal Co.**, Providence, R.I.	261.5	262.6	-0.4	127.0	131.0	—	—	43.0	46.0	91.5	85.6	—	—
70	77	**Century Communications Corp.**, New Canaan, Conn.	257.3	219.3	17.3	—	—	—	—	—	—	257.3	219.3	—	—
71	70	**Maclean Hunter**, Toronto	251.5	243.1	3.5	—	—	79.2	83.6	—	—	172.3	159.5	—	—
72	72	**TeleCable Corp.**, Norfolk, Va.	249.0	231.0	7.8	—	—	—	—	—	—	249.0	231.0	—	—
73	69	**Chicago Sun-Times**, Chicago	229.0	244.0	-6.1	229.0	244.0	—	—	—	—	—	—	—	—
74	79	**Seattle Times Co.**, Seattle	225.0	210.0	7.1	225.0	210.0	—	—	—	—	—	—	—	—
75	84	**Houston Industries**, Houston	224.7	199.9	12.4	—	—	—	—	—	—	224.7	199.9	—	—
76	82	**Heritage Media Corp.**, Dallas	222.3	203.9	9.0	—	—	—	—	51.2	51.0	—	—	171.1	152.9
77	75	**Petersen Publishing Co.**, Los Angeles	220.3	224.3	-1.8	—	—	220.3	224.3	—	—	—	—	—	—
78	73	**Blade Communications**, Toledo, Ohio	219.3	226.0	-3.0	162.0	172.0	—	—	18.5	18.0	38.8	36.0	—	—
79	74	**Forbes Inc.**, New York	211.2	225.7	-6.4	6.2	6.7	205.0	219.0	—	—	—	—	—	—
80	83	**Whittle Communications**, Knoxville, Tenn.	207.0	201.6	2.7	—	—	15.0	20.4	—	—	135.0	106.4	57.0	74.8
81	81	**Dispatch Printing Co.**, Columbus, Ohio	205.6	204.5	0.5	145.0	141.5	1.9	2.0	58.9	61.3	—	—	—	—
82	78	**Times Publishing Co.**, St. Petersburg, Fla.	204.0	213.0	-4.2	174.0	183.0	30.0	30.0	—	—	—	—	—	—
83	80	**Great American Communications**, Cincinnati	195.9	204.6	-4.3	—	—	—	—	195.9	204.6	—	—	—	—
84	54	**Maxwell Communications Corp.**, New York	180.7	321.8	-43.9	180.7	321.8	—	—	—	—	—	—	—	—
85	87	**CMP Publications**, Manhasset, N.Y.	178.0	175.0	1.7	—	—	178.0	175.0	—	—	—	—	—	—
86	89	**U.S. News & World Report**, Washington	175.0	170.2	2.8	—	—	175.0	170.2	—	—	—	—	—	—
87	88	**King Broadcasting Co.**, Seattle	175.0	157.0	11.5	—	—	—	—	100.0	91.0	75.0	66.0	—	—
88	86	**Patrick Media Group**, Scranton, Pa.	170.0	178.5	-4.8	—	—	—	—	—	—	—	—	170.0	178.5
89	85	**Pinelands**, Secaucus, N.J.	166.2	181.1	-8.2	—	—	—	—	166.2	181.1	—	—	—	—
90	90	**Univision Holdings**, New York	165.8	167.7	-1.1	—	—	1.8	2.0	164.0	165.7	—	—	—	—
91	92	**General Media International**, New York	163.0	162.0	0.6	—	—	163.0	162.0	—	—	—	—	—	—
92	91	**Howard Publications**, Oceanside, Calif.	155.0	163.0	-4.9	155.0	163.0	—	—	—	—	—	—	—	—
93	93	**McCaw Cellular Communications**, Kirkland, Wash.	150.3	157.8	-4.8	—	—	20.8	23.4	129.5	134.5	—	—	—	—
94	104	**Discovery Communications**, Bethesda, Md.	150.0	130.0	15.4	—	—	—	—	—	—	150.0	130.0	—	—
95	100	**Playboy Enterprises**, Chicago	149.5	147.3	1.5	—	—	122.8	119.2	—	—	26.7	28.1	—	—
96	96	**Straight Arrow Publishers**, New York	148.7	152.0	-2.2	—	—	148.7	152.0	—	—	—	—	—	—
97	94	**Macromedia**, Hackensack, N.J.	148.5	154.3	-3.8	126.5	128.8	—	—	22.0	25.5	—	—	—	—
98	97	**Crain Communications**, Chicago	145.6	150.1	-2.9	—	—	145.2	149.6	0.5	0.5	—	—	—	—
99	99	**Ackerley Communications**, Seattle	144.9	147.7	-1.9	—	—	—	—	66.6	63.4	—	—	78.3	84.3
100	101	**Westwood One**, Culver City, Calif.	144.4	145.9	-1.0	—	—	—	—	144.4	145.9	—	—	—	—

Notes: Dollars are in millions. All figures are net revenues and AA estimates. 1990 rankings adjusted to reflect figures shown. *Broadcast revenues include TV and radio. See Page S-10 for methodology.

Compiled by: R. Craig Endicott **AA Chart:** Kevin Brown

Newspaper niche

Rank 1991	Rank 1990	Company	Newspaper revenue 1991	Newspaper revenue 1990	Newspaper revenue % chg	% all media 1991
1	1	Gannett Co.	$2,629.8	$2,647.9	-0.7	77.8
2	2	Times Mirror Co.	1,973.8	2,066.0	-4.5	71.4
3	3	Knight-Ridder	1,953.6	2,040.0	-4.2	100.0
4	4	Advance Publications	1,714.0	1,797.0	-4.6	56.9
5	5	New York Times Co.	1,274.4	1,358.3	-6.2	74.8
6	6	Tribune Co.	1,141.6	1,196.7	-4.6	69.8
7	7	Dow Jones & Co.	963.1	983.7	-2.1	100.0
8	8	Cox Enterprises	709.0	731.8	-3.1	41.3
9	10	E.W. Scripps	691.0	712.4	-3.0	59.5
10	9	Hearst Corp.	680.0	715.0	-4.9	34.9
11	12	Thomson Corp.	645.2	654.0	-1.3	45.4
12	11	Washington Post Co.	642.7	691.0	-7.0	49.7
13	14	Capital Cities/ABC	521.3	524.2	-0.6	10.1
14	13	Media News Group	500.0	600.0	-16.7	100.0
15	15	Central Newspapers	420.4	431.7	-2.6	100.0
16	17	McClatchy Newspapers	412.1	405.9	1.5	100.0
17	16	Affiliated Publications	392.8	416.0	-5.6	100.0
18	18	Copley Newspapers	386.5	405.2	-4.6	100.0
19	19	Freedom Newspapers	382.0	400.0	-4.5	82.7
20	20	Journal Register Co.	325.0	323.0	0.6	100.0
21	23	Media General	299.2	302.8	-1.2	65.0
22	22	Harte-Hanks Communications	292.1	306.5	-4.7	91.7
23	25	Pulitzer Publishing Co.	284.4	287.3	-1.0	72.3
24	24	Landmark Communications	279.0	292.0	-4.5	75.9
25	26	Morris Communications	267.0	273.0	-2.2	100.0
26	29	A.H. Belo Corp.	249.7	246.5	1.3	57.9
27	27	Cowles Media Co.	244.9	251.2	-2.5	80.7
28	30	Donrey Media Group	237.0	245.0	-3.3	74.3
29	28	Chronicle Publishing Co.	235.0	248.0	-5.2	55.3
30	32	Journal Communications	229.5	232.5	-1.3	81.5
31	31	Chicago Sun-Times	229.0	244.0	-6.1	100.0
32	33	Seattle Times Co.	225.0	210.0	7.1	100.0
33	34	Lee Enterprises	207.6	196.5	5.6	74.9
34	21	Maxwell Communication Corp.	180.7	321.8	-43.9	100.0
35	35	Times Publishing Co.	174.0	183.0	-4.9	85.3
36	36	News Corp.	164.0	174.4	-6.0	7.2
37	37	Blade Communications	162.0	172.0	-5.8	73.9
38	38	Howard Publications	155.0	163.0	-4.9	100.0
39	39	Dispatch Printing Co.	145.0	141.5	2.5	70.5
40	40	Multimedia Inc.	129.0	135.3	-4.7	31.1
41	41	Providence Journal Co.	127.0	131.0	-3.1	48.6
42	42	Macromedia	126.5	128.8	-1.8	85.2
43	43	K-III Holdings	73.6	70.0	5.1	19.6
44	44	Forbes Inc.	6.2	6.7	-7.5	2.9

Notes: Dollars are in millions. All figures are AA estimates. See methodology on Page S-10.

Newspapers consistent; 37 of 44 feel the pinch

The decline in the newspaper business, the revenue volume leader among Top 100 media segments, was very democratic: Lower revenues were returned by Gannett Co., the biggest newspaper company on the chart, as well as Forbes Inc., the smallest.

Thirty-seven of the 44 companies with newspaper operations that reported declines dropped an average 3.7%. Overall newspaper revenues hit $23.1 billion, down 4.1%.

However, this second annual decline in a row (in 1990 the Top 100's newspaper properties dropped 0.1%) should give way to positive growth in 1992 if the national advertising growth charted in the first five months is any indication.

National, about a tenth of total newspaper revenues, grew to $3.94 billion in the first five months, up a dramatic 39.6% over the prior-year period, notes LNA/Arbitron Multi-Media Service. For full-year 1991, national ads played out, plunging 21.2% to $7.63 billion.

Of that, the largest newspaper category, general and retail advertising, shot up 68.3% to $2.05 billion in the five months. Transportation, the second largest category, grew 16.6% to $922 million; business and financial rose 19.6% to $835 million.

Sluggish classified and local retail advertising have dampened overall growth, however. This has been reflected in marginal second-quarter upticks at newspaper divisions of Top 100 companies.

Hard times felled several newspapers in late 1991 and early this year. The *Richmond* (Va.) *Times-Dispatch* in September was folded by owner Media General into its flagship *Richmond News Leader* after years of declining circulation; the *Daily Journal* in Elizabeth, N.J., was closed in early January by Media News Group; and in February Copley Newspapers merged its morning *Union* and afternoon *Tribune* to form the *San Diego Union-Tribune*.

Dallas became a one-newspaper town when A.H. Belo Corp., which had fought long and hard with the *Dallas Times-Herald* over circulation claims and comic strip rights, finally bested its bitter rival by buying it out and then closing it.

Magazines hold their own, and that's a victory

Magazine properties among the Top 100 may have been only one of two media categories to show collective growth in revenues in 1991, but that isn't much to crow about.

The medium squeezed out a 0.5% gain in revenue to $12.7 billion—the product of fewer ad pages, higher rates and higher circulation prices.

The gain was virtually the mathematical median of the 38 companies with magazine divisions, half of which reported negative growth, the biggest decline coming from Whittle Communications, down 26.5%, as it discontinued numerous publications to expand its non-traditional media side.

Strength in the computer sector fostered growth at Ziff Communications, up 20.1%, and CMP Publications, up 1.7%. Ziff was aided by the mid-1991 introduction of *PC Sources*, which generated an estimated $10 million in net revenues from advertising for the half year.

An analysis of the nation's top 300 magazines (AA, June 15) shows total gross revenues were up 1%, a factor of a decline of 0.3% in gross ad revenues from the 300 and 2.8% growth in revenues from circulation. Circulation components included higher subscription rates and newsstand prices as paid subscribers were off 1.6% and single-copy sales were down 3.2%.

Publishers are breathing more easily in 1992. Consumer magazines rose to $2.8 billion from January through May for a 5.8% growth, albeit the numbers are being compared with an extremely depressed period in 1991.

A number of start-ups among the Top 100 include *Soap Opera Magazine* by Enquirer/Star Group, *Men's Journal* by Straight Arrow Publishers, *Martha Stewart Living* by Time Warner, *Allure* by Advance Publications' Conde Nast division, *Country Gardens* and *Creative Woodworking* by Meredith Corp., and Hearst Corp.'s *Living Well* and *SmartMoney*, ventures with American Medical Association and Dow Jones & Co., respectively.

Casualties include *Connoisseur*, merged in late 1991 by Hearst Corp. into *Town & Country* after efforts to revive the publication failed. K-III closed *European Travel & Life*, the former News Corp. publication, when it couldn't find a buyer.

Family Media, No. 82 a year ago, closed its doors last August, bringing an end to *Health* and *1,001 Home Ideas*. Two of its magazines, *Golf Illustrated* and *Discover*, found homes, but not with Top 100 companies.

Business publishers Pittway Corp. and Advanstar Communications, formerly Edgell Communications, fell from the rankings.

Magazine marks

Rank 1991	Rank 1990	Company	Magazine revenue 1991	Magazine revenue 1990	Magazine revenue % chg	% all media 1991
1	1	Time Warner	$1,928.0	$1,947.8	-1.0	36.9
2	2	Hearst Corp.	1,002.0	1,022.0	-2.0	51.5
3	3	Advance Publications	859.0	845.0	1.7	28.5
4	4	Thomson Corp.	774.4	750.0	3.3	54.6
5	7	Reed International	760.0	624.0	21.8	74.9
6	6	Reader's Digest Association	729.2	681.4	7.0	100.0
7	8	International Data Group	627.0	528.0	18.8	100.0
8	5	News Corp.	575.0	707.3	-18.7	25.2
9	9	McGraw-Hill	448.0	485.0	-7.6	82.0
10	10	Meredith Corp.	441.7	432.0	2.2	80.2
11	13	Ziff Communications	436.0	363.0	20.1	100.0
12	11	Hachette Publications	389.0	387.0	0.5	100.0
13	15	New York Times Co.	352.7	340.0	3.7	20.7
14	14	Washington Post Co.	326.5	340.2	-4.0	25.3
15	12	Capital Cities/ABC	321.0	367.2	-12.6	6.2
16	17	K-III Holdings	302.8	291.9	3.7	80.4
17	16	Times Mirror Co.	291.5	313.4	-7.0	10.5
18	18	National Geographic Society	279.7	279.6	0.0	100.0
19	19	Enquirer/Star Group	275.2	235.8	16.7	100.0
20	20	Petersen Publishing Co.	220.3	224.3	-1.8	100.0
21	21	Forbes Inc.	205.0	219.0	-6.4	97.1
22	22	CMP Publications	178.0	175.0	1.7	100.0
23	23	U.S. News & World Report	175.0	170.2	2.8	100.0
24	24	General Media International	163.0	162.0	0.6	100.0
25	25	Straight Arrow Publishers	148.7	152.0	-2.2	100.0
26	26	Crain Communications	145.2	149.6	-3.0	99.7
27	27	Playboy Enterprises	122.8	119.2	3.0	82.1
28	28	Maclean Hunter	79.2	83.6	-5.3	31.5
29	29	Cowles Media Co.	58.7	56.4	4.1	19.3
30	30	Times Publishing Co.	30.0	30.0	0.0	14.7
31	31	McCaw Cellular Communications	20.8	23.4	-11.0	13.8
32	32	Whittle Communications	15.0	20.4	-26.5	7.2
33	33	Landmark Communications	9.2	10.3	-10.7	2.5
34	35	Cox Enterprises	2.0	2.0	0.0	0.1
35	34	Dispatch Printing Co.	1.9	2.0	-5.0	0.9
36	36	Univision Holdings	1.8	2.0	-8.1	1.1
37	37	Media General	1.6	1.9	-15.8	0.3

Notes: Dollars are in millions. All figures are AA estimates. See methodology on Page S-10.

Tops in TV

Rank 1991	Rank 1990	Company	TV revenue 1991	TV revenue 1990	% chg	% all media 1991
1	1	Capital Cities/ABC	$3,395.0	$3,405.0	-0.3	65.6
2	2	General Electric Co.	3,086.0	3,202.9	-3.6	97.9
3	3	CBS Inc.	2,789.4	3,011.0	-7.4	91.9
4	4	News Corp.	964.0	964.0	0.0	42.3
5	5	Westinghouse Electric Corp.	502.0	534.0	-6.0	74.6
6	6	Tribune Co.	446.0	458.9	-2.8	27.3
7	8	Cox Enterprises	315.0	330.8	-4.8	18.4
8	9	Gannett Co.	294.8	319.2	-7.6	8.7
9	7	Gillett Holdings	275.0	389.4	-29.4	99.8
10	10	Chris-Craft Industries	262.6	278.1	-5.6	100.0
11	11	Hearst Corp.	243.0	260.0	-6.5	12.5
12	12	E.W. Scripps	232.7	222.3	4.7	20.0
13	18	Paramount Communications	184.6	145.0	27.3	68.3
14	13	A.H. Belo Corp.	181.9	192.6	-5.6	42.1
15	14	Pinelands	166.2	181.1	-8.2	100.0
16	16	Univision Holdings	164.0	165.7	-1.1	98.9
17	15	Washington Post Co.	163.5	179.4	-8.9	12.7
18	21	Multimedia Inc.	137.1	120.0	14.3	33.0
19	17	Gaylord Entertainment Co.	133.4	154.9	-13.9	37.0
20	19	McCaw Cellular Communications	129.5	134.5	-3.7	86.2
21	20	Great American Communications	120.4	133.2	-9.6	61.5
22	22	Meredith Corp.	109.1	111.8	-2.4	19.8
23	24	King Broadcasting Co.	100.0	91.0	-11.5	57.1
24	26	McGraw-Hill	98.1	104.0	-5.6	18.0
25	23	Chronicle Publishing Co.	98.0	108.0	-9.3	23.1
26	27	Pulitzer Publishing Co.	96.0	101.4	-5.3	24.4
27	25	Times Mirror Co.	94.2	104.5	-9.9	3.4
28	28	Viacom International	80.1	88.8	-9.8	5.5
29	29	Freedom Newspapers	80.0	85.0	-5.9	17.3
30	30	Lee Enterprises	69.7	71.3	-2.2	25.1
31	31	New York Times Co.	60.0	63.0	-4.8	3.5
32	32	Dispatch Printing Co.	56.6	59.0	-4.1	27.5
33	34	Ackerley Communications	55.1	50.9	8.3	38.0
34	33	Media General	52.3	56.8	-7.9	11.4
35	35	Providence Journal Co.	43.0	46.0	-6.5	16.4
36	36	Journal Communications	37.0	41.4	-10.6	13.1
37	37	Heritage Media Corp.	35.3	35.8	-1.4	15.9
38	38	Harte-Hanks Communications	26.6	28.4	-6.3	8.3
39	39	Macromedia	22.0	25.5	-13.7	14.8
40	40	Blade Communications	18.5	18.0	2.8	8.4
41	41	Landmark Communications	17.5	13.4	30.6	4.8
42	42	Donrey Media Group	9.9	10.3	-3.9	3.1

Notes: Dollars are in millions. All figures are AA estimates. See methodology on Page S-10

TV and radio-driven companies take it in ear

The nation's top TV and radio companies emitted weak signals on the revenue side in 1991. But stepped-up ad spending—at least in network and spot TV—should strengthen reception in 1992.

TV revenues for the 42 Top 100 companies with TV operations dropped a precipitous 4.1% to $15.4 billion in 1991. The dollar drain flowed from top to bottom as 34 companies suffered declines that averaged about 6%.

The Big 3 actually stemmed the flow a bit, declining only 3.6% in total TV revenues, a number highly influenced by collective network-only revenues of $7.55 billion, down 3.4%.

Both CBS and Capital Cities/ABC have shown stronger operating results in the first half of 1992, the result of growing ad dollars and higher prices.

In the first five months of 1992, total network TV advertising rose 2.7% to $4.2 billion; spot TV measured a 3.8% gain to $3.5 billion; and syndicated TV slowed, rising 8.2% to $808 million, according to LNA/Arbitron Multi-Media Service, which measured a 6.7% drop in network, 5.8% fall in spot and 16.6% growth in syndicated TV for all of 1991.

For network TV, drugs and toiletries and general and retail advertisers stimulated spending 7.6% and 5.5% in the first five months over the prior-year period. Promoters in the massive foods and beverages category spent 4.7% less.

Few TV properties changed hands in 1991 or early 1992. CBS bought WCCO-TV in Minneapolis and WFRV-TV in Green Bay in early 1992, and Providence Journal Co., in a joint venture, bought King Broadcasting Co. and its six TV stations.

Radio revenues for the 22 companies with radio properties declined 0.7% to $1.4 billion *(see radio chart on Page S-10)*.

That slippage is likely to continue through 1992. In the first five months, spot radio ad spending hit $395 million, down 4.9% compared to the prior year. Network radio slumped, too, by 3.6% to $227.3 million.

One bright spot in radio is deregulation. This month the Federal Communications Commission plans to relax its rules that limit ownership in a single market to one FM and one AM station and that hold the line on total ownership to 12 AM and 12 FM stations.

Growth slows, but cable still stands out in media

Move aside TV, cable is now the cash cow of the media business, though the grass is thinning.

Most cable companies in the Top 100 had record cash flow in 1991 as they racked up $18 billion in revenues, up 11% from 1990 when the cable segment overtook TV's contribution to the Top 100.

Revenue growth cooled off from the 18.1% notched in 1990, however. National cable network advertising grew 9.2% (vs. 16.4% in 1990) to $1.5 billion, still a relatively small portion of the cable revenue stream.

A strong May perked up cable TV network advertising in the first five months of 1992. Growth had been 7.6% through April and changed to an 11.2% cumulative in May on a total of $551.3 million, according to LNA/Arbitron Multi-Media Service. Food and beverages, cable's largest ad category, grew 6.4% in accounting for 21% of the total. General and retail advertisers, the next largest cable group, dropped 6.2% to $101.6 million.

Most of cable's growth in 1991 came from a larger customer base and higher prices for existing services. Americans paid about $18 billion for cable programming in 1991, and cable bills have shot up 61% from the beginning of 1987 when Congress deregulated the business through mid-1991. Therein lies the rub.

Regulation ahead. The U.S. House overwhelmingly approved a bill last month that would force multiple system operators to roll back prices of basic programming and allow TV stations to charge cable systems for the right to transmit their broadcast signals. The Senate passed a similar bill earlier this year.

If new regulations stanch cable's cash flow, the industry will find it hard to retire its debt, incurred largely during the 1980s as cable operators grew through acquisition.

Debt is a major reason most of the those in the Top 100 consistently suffer losses from year to year. Of the 12 public cable companies in the Top 100, 10 showed losses—albeit losses less than in 1990. A major reason for this reduction in loss is lower payments to meet lower interest rates available through refinancing.

The Top 100 still took on debt. Providence Journal Co., in a co-venture, bought King Broadcasting Co. Discovery Communications added Learning Channel, and Landmark Communications gained Travel Channel.

Time Warner refinanced its debt this May to finance Time Warner Entertainment. Toshiba Corp. and C. Itoh & Co. each contributed $500 million in exchange for 6.3% stakes in TWE.

Cable connections

Rank 1991	Rank 1990	Company	Cable TV revenue 1991	Cable TV revenue 1990	% chg	% all media 1991
1	1	Time Warner	$3,301.0	$3,017.0	9.4	63.1
2	2	Tele-Communications Inc.	3,206.0	2,942.0	9.0	100.0
3	3	Viacom International	1,300.2	1,173.5	10.8	89.1
4	4	Turner Broadcasting System	1,190.7	1,069.1	11.4	100.0
5	5	Continental Cablevision	1,127.0	938.0	20.1	100.0
6	6	Comcast Corp.	647.1	585.7	10.5	100.0
7	8	SCI Holdings	606.7	553.1	9.7	100.0
8	7	Cablevision Systems Corp.	603.3	563.0	7.2	100.0
9	9	Cox Enterprises	596.0	547.0	9.0	34.7
10	10	Capital Cities/ABC	489.4	446.0	9.7	9.5
11	11	Advance Publications	440.0	397.6	10.7	14.6
12	12	Times Mirror Co.	403.8	371.3	8.8	14.6
13	13	Cablevision Industries Corp.	334.7	299.4	11.8	100.0
14	15	USA Network	315.0	267.0	18.0	100.0
15	14	Sammons Communications	284.6	268.5	6.0	100.0
16	16	Paragon Communications	284.0	254.0	11.8	100.0
17	17	Adelphia Communications Corp.	276.7	250.2	10.6	100.0
18	19	Century Communications Corp.	257.3	219.3	17.3	100.0
19	18	TeleCable Corp.	249.0	231.0	7.8	100.0
20	21	E.W. Scripps	225.2	199.4	12.9	19.4
21	20	Houston Industries	224.7	199.9	12.4	100.0
22	22	Gaylord Entertainment Co.	222.5	184.5	20.6	61.7
23	23	Maclean Hunter	172.3	159.5	8.0	68.5
24	24	Washington Post Co.	159.5	145.5	9.6	12.3
25	25	Discovery Communications	150.0	130.0	15.4	100.0
26	26	Multimedia Inc.	135.5	120.5	12.5	32.6
27	27	Whittle Communications	135.0	106.4	26.9	65.2
28	28	Media General	107.3	96.6	11.1	23.3
29	30	Chronicle Publishing Co.	92.0	84.0	9.5	21.6
30	29	Providence Journal Co.	91.5	85.6	6.9	35.0
31	31	Paramount Communications	85.7	77.0	11.3	31.7
32	32	King Broadcasting Co.	75.0	66.0	13.6	42.9
33	35	General Electric Co.	67.5	33.1	103.9	2.1
34	33	Landmark Communications	59.7	52.5	13.7	16.2
35	34	Blade Communications	38.8	36.0	7.8	17.7
36	36	Playboy Enterprises	26.7	28.1	-5.0	17.9
37	37	Donrey Media Group	15.2	14.0	8.6	4.8

Notes: Dollars are in millions. All figures are AA estimates. See methodology on Page S-10

Top 30 publicly held media companies by return on sales

Rank 1991	Rank 1990	Company, headquarters	Percent return on sales 1991	1990	change	Total revenues 1991	1990	% chg	Net income 1991	1990	change	Total media revenues 1991	1990	% chg
1	48	Great American Communications	43.5	-17.4	60.9	211.5	223.6	-5.4	92.0	-39.0	131.0	195.9	204.6	-4.3
2	1	Chris-Craft Industries	20.5	98.0	-77.5	283.8	297.6	-4.6	58.3	291.7	-233.4	262.6	278.1	-5.6
3	3	Reuters Holdings	15.7	15.2	0.4	2,741.4	2,450.5	11.9	429.5	373.0	56.5	427.1	419.0	1.9
4	41	Meredith Corp.	11.1	-3.6	14.7	747.7	735.4	1.7	83.1	-26.4	109.5	550.8	543.8	1.3
5	8	Reed International	10.0	9.9	0.1	2,820.8	2,923.7	-3.5	283.4	290.3	-6.9	1,015.3	804.0	26.3
6	13	Houston Industries	9.4	8.1	1.3	4,443.7	4,178.6	6.3	417.4	339.5	77.9	224.7	199.9	12.4
7	9	Multimedia Inc.	9.2	9.5	-0.3	524.3	480.7	9.1	48.4	45.6	2.8	415.1	390.6	6.3
8	4	Lee Enterprises	9.1	15.1	-6.0	346.3	287.5	20.5	31.5	43.5	-12.0	277.3	267.8	3.6
9	6	Gannett Co.	8.9	11.0	-2.0	3,382.0	3,441.6	-1.7	301.6	377.0	-75.4	3,382.0	3,441.6	-1.7
10	12	Reader's Digest Association	8.9	8.8	0.2	2,345.1	2,009.7	16.7	209.1	176.0	33.1	729.2	681.4	7.0
11	7	3M	8.7	10.0	-1.4	13,340.0	13,021.0	2.4	1,154.0	1,308.0	-154.0	265.0	265.0	0.0
12	10	McGraw-Hill	7.6	8.9	-1.3	1,943.0	1,938.6	0.2	148.0	172.5	-24.5	546.1	589.0	-7.3
13	37	Paragon Communications	7.3	-0.2	7.4	284.0	254.0	11.8	20.6	-0.4	21.0	284.0	254.0	11.8
14	39	Tribune Co.	7.0	-2.7	9.7	2,034.7	2,353.0	-13.5	142.0	-63.5	205.5	1,636.6	1,703.0	-3.9
15	11	Capital Cities/ABC	6.4	8.9	-2.5	5,382.0	5,385.6	-0.1	343.5	477.8	-134.3	5,172.0	5,175.0	-0.1
16	18	Central Newspapers	6.2	6.6	-0.4	420.4	431.7	-2.6	25.9	28.3	-2.4	420.4	431.7	-2.6
17	47	Westwood One	6.1	-12.5	18.6	144.4	145.9	-1.0	8.8	-18.2	27.0	144.4	145.9	-1.0
18	19	Knight-Ridder	5.9	6.5	-0.6	2,237.3	2,305.2	-2.9	132.1	149.0	-16.9	1,953.8	2,040.0	-4.2
19	36	Turner Broadcasting System	5.8	0.3	5.5	1,480.2	1,393.5	6.2	85.9	4.6	81.3	1,190.7	1,069.1	11.4
20	20	McClatchy Newspapers	5.6	6.3	-0.7	426.8	421.4	1.3	23.7	26.4	-2.7	412.1	405.9	1.5
21	22	E.W. Scripps	5.5	5.5	-0.1	1,299.6	1,296.6	0.2	71.0	71.7	-0.7	1,161.6	1,147.4	1.2
22	15	Thomson Corp.	5.2	7.2	-2.0	5,589.0	5,364.0	4.2	292.0	385.0	-93.0	1,419.6	1,404.0	1.1
23	5	Washington Post Co.	5.1	12.1	-7.0	1,380.3	1,436.6	-4.1	70.8	174.6	-103.8	1,292.2	1,356.1	-4.7
24	21	Dow Jones & Co.	4.2	6.2	-2.0	1,725.1	1,720.1	0.3	72.2	106.9	-34.7	963.1	983.7	-2.1
25	14	General Electric Co.	3.9	7.4	-3.4	60,236.0	58,414.0	3.1	2,363.0	4,303.0	-1,940.0	3,153.5	3,236.0	-2.5
26	33	Cowles Media Co.	3.4	1.9	1.5	303.6	307.6	-1.3	10.2	5.8	4.4	303.6	307.6	-1.3
27	35	Maclean Hunter	3.3	1.0	2.3	1,335.6	1,315.1	1.6	44.0	13.1	30.9	251.5	243.1	3.5
28	17	Paramount Communications	3.1	6.7	-3.6	3,895.4	3,869.0	0.7	122.2	259.1	-136.9	270.3	222.0	21.8
29	16	A.H. Belo Corp.	2.9	6.7	-3.9	431.6	439.1	-1.7	12.4	29.6	-17.2	431.6	439.1	-1.7
30	30	Advo Inc.	2.8	2.5	0.3	697.4	655.0	6.5	19.3	16.4	2.9	697.4	655.0	6.5

Notes: Dollars are in millions. **Source:** Company reports.

Methodology for Top 100 media

Companies among the 100 Leading Media Companies were ranked by net revenues generated by their media properties.

Net revenues exclude ad agency commission and such circulation items as provision for newsstand returns, unpaid subscriptions and subscription agency commissions. These are accepted practices by public companies.

Revenues from non-media activities were not included in totals. Such businesses generally included contract printing, book publishing, book and record clubs, movie production, syndication, broadcast program production, database delivery, real estate, paper mills, etc.

Net revenue totals were either for calendar year 1991 or the latest available fiscal year. In few exceptions did *Advertising Age* pull fiscal numbers from periods ending prior to 1992.

Essentially, the ranking is based on net revenues from U.S. media operations. Foreign-based companies were ranked by U.S. media returns, while U.S.-based companies were ranked by total media returns. U.S. media companies have few media properties of any size abroad.

Editors applied GAAP (General Accepted Accounting Principles) standards in consolidating revenues from media operations. This standard is followed by the public companies on the list. Under this standard a company must own more than 50% of a media unit before it consolidates the subsidiary's returns. A 51% ownership means full credit of revenues.

This procedure allows the 50/50 joint ventures to be ranked. Revenues of such operations are not consolidated in parent totals. Such companies include: Paragon Communications, King Broadcasting Co. and USA Network.

Figures were either pulled from public documents or provided by contacts at the 46 private companies on the list. Where required, estimates were either calculated by editors based on historic readings of properties involved or obtained from consultants, including Paul Kagan & Associates for cable and for radio, Jim Duncan, who publishes the annual "Duncan's Radio Market Guide." Estimates were read to the company when possible.

Top 10 in Yellow Pages

Rank 1991	Rank 1990	Company	Yellow Pages revenue 1991	1990	% chg	Total revenue 1991
1	1	BellSouth Corp.	$1,426.3	$1,394.2	2.3	$14,445.5
2	2	GTE Corp.	1,200.0	1,200.0	0.0	19,621.0
3	3	Bell Atlantic	994.6	956.3	4.0	12,279.7
4	4	Pacific Telesis Group	990.0	948.0	4.4	9,895.0
5	6	US West	853.7	843.2	1.2	10,577.2
6	5	Nynex Corp.	849.2	850.8	-0.2	13,228.8
7	7	Southwestern Bell Corp.	847.7	794.3	6.7	9,331.9
8	9	Ameritech Corp.	515.4	NA	NA	10,818.4
9	8	Dun & Bradstreet Corp.	463.1	449.9	2.9	4,642.8
10	10	DonTech	459.6	NA	NA	459.6

Notes: Dollars are in millions. **Sources:** Company reports. See story below.

BellSouth builds lead in year of flat growth

The advertising well isn't getting any deeper for Yellow Pages.

Total revenues from directories advertising in 1991 rose to $9.18 billion, up 2.9% from the prior year—still better than most media.

The medium is maintaining that low growth; revenues were up 2.25% in first quarter 1992, according to Yellow Pages Publishers Association.

BellSouth Corp., which claimed the revenue lead among directory publishers in 1990 by overtaking GTE Corp., built on its lead in 1991 with a 2.3% increase to $1.4 billion as GTE remained flat at $1.2 billion, a figure the company terms "approximate."

New entry No. 10 DonTech represents a redistribution of revenues from Ameritech Corp. Ameritech linked with Dun & Bradstreet's R.H. Donnelley unit to form the 50/50 joint venture publishing Ameritech's Illinois and Northwest Indiana directories.

Unlike other media that may benefit from elections or the Olympics, Yellow Pages calls every year upon its bread-and-butter, the mom-and-pop operations (national advertising represents only about 12.6% of total Yellow Pages advertising).

"And a lot of mom-and-pops have gone out of business in the recession," says Larry Small, VP-marketing services at YPPA. Growth depends on building an eroded ad base by developing new ideas.

There are several new offerings: Map books, a collection of full-color community street maps, ZIP codes and airport and railroad information; CD-ROM versions of street-address directories of residential and business listings for direct marketers; menu listings; and four-color ads.

Radio rankings

Rank 1991	Rank 1990	Company	Radio revenue 1991	1990	% chg	% all media 1991
1	1	Capital Cities/ABC	$317.0	$319.0	-0.6	6.1
2	2	CBS Inc.	245.6	250.2	-1.8	8.1
3	3	Westinghouse Electric Corp.	171.0	170.0	0.6	25.4
4	4	Westwood One	144.4	145.9	-1.0	100.0
5	5	Cox Enterprises	94.0	88.3	6.5	5.5
6	7	Viacom International	79.0	75.2	5.1	5.4
7	8	Great American Communications	75.5	71.4	5.7	38.5
8	6	Gannett Co.	65.3	77.5	-15.7	1.9
9	9	Tribune Co.	49.0	47.4	3.4	3.0
10	10	Hearst Corp.	22.2	25.2	-11.9	1.1
11	11	Heritage Media Corp.	15.9	15.2	4.9	7.2
12	12	Journal Communications	15.1	15.1	0.0	5.4
13	13	Multimedia Inc.	13.5	14.8	-8.8	3.3
14	14	Pulitzer Publishing Co.	13.0	14.1	-7.8	3.3
15	15	E.W. Scripps	12.7	13.3	-4.7	1.1
16	16	Ackerley Communications	11.5	12.5	-8.0	7.9
17	17	New York Times Co.	6.5	6.0	8.3	0.4
18	18	Gaylord Entertainment Co.	5.0	5.1	-2.0	1.4
19	19	Dispatch Printing Co.	2.3	2.3	0.0	1.1
20	20	Landmark Communications	2.0	2.1	-4.8	0.5
21	21	Gillett Holdings	0.6	0.6	0.0	0.2
22	22	Crain Communications	0.5	0.5	0.0	0.3

Notes: Dollars are in millions. All figures are AA estimates. See broadcast story Page S-8.

FOR THE RECORD

HILTON HOTELS CORP. said it won't broaden its review in the wake of the withdrawal of Goodby, Berlin & Silverstein, San Francisco. Remaining agencies under consideration for the estimated $16 million account are Chiat/Day/Mojo, Venice, Calif.; Dailey & Associates, Los Angeles; Wieden & Kennedy, Portland, Ore.; and incumbent McCann-Erickson Worldwide, Los Angeles.

BRIDGESTONE/FIRESTONE this fall will introduce the Runflat tire and wheel system, which allows a vehicle to travel 50 miles on a flat tire. The system will cost about $5,000 and will initially be available only on some Corvettes. A limited ad campaign launching the Runflat system breaks in October. Goodyear Tire & Rubber Co. will launch a similar product, the Eagle EMT (Extended Mobility Tire).

LANG COMMUNICATIONS awarded exclusive TV development rights for its magazines for at least one year to Pat Mastandrea, who resigned as group publisher. Lang said "Working Woman," the syndicated show based on the magazine of the same name, is adding markets and that the company is close to a deal with a new production partner for "Jane," a talk show for young adults starring *Sassy* Editor in Chief Jane Pratt. Lang is also believed to be developing a show based on *Dirt*, its magazine for teen boys.

SNACK VENTURES EUROPE, formed by the merger of the European snack food businesses of General Mills and PepsiCo Foods International, has received the European Commission's go-ahead to operate. The $600 million company will be headquartered in Brussels. Michael J. Dolan, former senior VP-operations of PepsiCo Foods International, will serve as president-ceo.

WEEBOK, the juvenile division of Reebok International, has joined forces with Right Start to launch a Weebok catalog. The new catalog will be mailed in the first quarter of 1993.

GREEN GIANT CO. in October will launch a line of seven vegetable mixes packed in glass jars. Six of the products were the top sellers of Aunt Nellie's, acquired by Pillsbury Co. last year.

NEW CAMPAIGNS: Ralston Purina Co. last week broke a promotion and ad campaign for Cookie-Crisp cereal. The cereal's two animated spokescharacters, Chip the dog and the Cookie Crook, star in the promotion and commercial, running on network and spot TV. On-pack coupons support the promotion. Avrett, Free & Ginsberg, New York, handles. . . . **Anheuser-Busch** has unveiled new spots in the "Beer talk" Budweiser campaign, some using footage from old Budweiser spots with spokesman Ed McMahon. D'Arcy Masius Benton & Bowles, St. Louis, handles. . . . **General Mills** has begun a network, cable and spot TV campaign for its renamed Oatmeal Crisp cereals. Campbell-Mithun-Esty, Minneapolis, handles.

ACCOUNT ACTION: Sun Co., Radnor, Pa., to **Hal Riney & Partners**, New York, pending an agreement on compensation, from Wells Rich Greene BDDP for its estimated $10 million Sunoco account. . . . **Domino's Pizza**, Ann Arbor, Mich., to **Ross Roy Advertising**, Bloomfield Hills, from Bayer Bess Vanderwarker, Chicago, for the estimated $6 million Midwest regional account. . . . **Serta**, Des Plaines, Ill., to **Hal Riney & Partners**, Chicago, from Noble & Associates for its $5 million TV and print account.

WORTH NOTING: Lintas:Worldwide opened its third central European office, Lintas:Warsaw, with Piotr Gawel as managing director. . . . **The Tulsa (Okla.) Tribune** will cease publication Sept. 30 when its joint operating agreement with the *Tulsa World* ends. The evening *Tribune* had a circulation of 66,647 for the six months ended March 31, down 3.5% from the previous year.

Chrysler

(Continued from Page 3)

rope until March of this year.

Besides being nervous about Mr. Eaton, agencies are aware that Chrysler plans to restructure its distribution system by the mid-1990s. The automaker may drop Plymouth or Eagle, or both, and consolidate the company's three selling divisions into two.

Ross Roy's work for Chrysler includes putting together the current $30 million training program to improve dealers' customer care, running telemarketing and database marketing programs, and producing product catalogs.

The collateral business is viewed as producing a tidy profit for Ross Roy, but it's believed Chrysler executives have taken a tougher stance in negotiations about agency compensation.

Meanwhile, after CME produced the recent introductory catalog for the Jeep Grand Cherokee, Bozell and BBDO renewed behind-the-scenes efforts to take over the catalogs for the brands they handle.

Ross Roy Group has positioned itself as a one-stop-shopping agency, with units that specialize in advertising, sales promotion, training and franchising, and subsidiaries in areas such as public relations and Yellow Pages advertising. Ross Roy reported consolidated capitalized billings of $700 million in 1991.

Besides Chrysler, Ross Roy's other major national client is Kmart Corp., handled by Ross Roy Advertising and subsidiary Calet, Hirsch & Ferrell, New York. □

Pat Sloan and John P. Cortez contributed to this story.

Ad Age survey

(Continued from Page 1)

smiling," said one respondent. "That's not how we are. Ads just perpetuate stereotypes."

In the survey, 54.8% of respondents said print ads don't include enough black people, and 52.4% said the same about TV commercials. Additionally, 47.4% believe print advertising portrays black consumers inaccurately and 45.9% said the same for TV commercials. A vast majority—93.8%—of respondents were white; 3.5% were black and the rest had other racial backgrounds.

"The only way blacks are portrayed—and TV is the worst offender—is as athletes," one respondent said. "This portrayal fuels stereotypes and makes it seem like the only way to make it in this country if you are black is to be a Magic Johnson type."

Said another: "Blacks must be very frustrated by ads that portray them so inaccurately. The tension builds over this as blacks don't have any control or influence over what is portrayed in ads. As a result, the tension must escalate so you have situations like the L.A. riots."

The absence of blacks in advertising more than stereotyping makes black people irate about their situation and status, said Marilyn Kern-Foxworth, a journalism professor at Texas A&M University who is writing a book on the history of blacks in advertising.

"There's been a drastic erosion of self-esteem with young African-Americans—and it's partially because the images they see of themselves are either negative, offensive or not there," she said.

Inclusion is important, but portrayal is crucial, said Valerie Graves, senior VP-creative director at UniWorld Group, New York.

"I have to think [advertising has] a lot of influence on the American psyche," she said. "It's more a matter of *how* people are included rather than that they are included. Most smart advertisers have some African-American representation in their commercials, but that's a far cry from having our culture and concerns as the focus of the action. You see an African-American there but he's not doing anything, not making any contribution, and that might contribute to a second-class citizen mentality."

Overall, however, Ms Graves said she's seen an improvement in the way black people are used in ads.

"It's gotten better because the 1990 census made advertisers look at the diversity of this country. It made them realize they will have to address minority markets in a meaningful way, and not just as a PR tool."

Ms. Kern-Foxworth said some mainstream ads have even had a positive effect on the self-esteem of black youths. As examples, she cited a Jockey International print ad, created in-house, that features a black economist with the U.S. Department of Agriculture's Foreign Agricultural Service, and one for Samsonite Corp. that shows a young black woman dressed in business attire and sitting in the first-class section of an airplane. The woman is talking with a middle-age white man, also dressed in a business suit.

"Slowly I'm seeing things that are different and positive," Ms. Kern-Foxworth said. In the Samsonite ad, "first they've got a black female doing business travel, and then she's in first class. It's positive because it's going against the status quo." Leo Burnett USA, Chicago, created the ad.

Many respondents to the *Ad Age* survey said cigarettes and alcohol—both heavy advertisers in black media—are harmful to the black community.

"It's more a matter of *how* people are included rather than that they are included."

"Things like the PowerMaster malt liquor that target such a volatile group [inner-city young black men] so negatively can only worsen racial tensions," one survey respondent said. That product "may have even influenced the race riots in L.A. Who knows?"

Respondents also were asked how they felt about products like alcohol and cigarettes being targeted to different consumer groups as well as to blacks specifically. Of those questioned, 37.8% said they approve of target marketing such products in general and 33.8% said they approve of targeting them specifically to blacks. But a large number of respondents, 43.4%, said they disapproved of targeting alcohol and cigarettes to black consumers.

Employment of blacks in the ad industry also has been a problem, the survey found. More than half the respondents—56.5%—do not work with any blacks in non-clerical positions in their department, and 16.8% work only with one. Ad agency employees are less likely to work with black people than employees of other marketing companies: 60% of agency workers said they work with no black people in non-clerical positions on a regular basis vs. 51.3% of advertisers and 58% of media employees.

"The ad industry has a horrifying record in terms of minority hiring and involvement," said Ms. Graves, who in 1985 was the only black featured in *Ad Age's* "Best & Brightest" ranking of agency people. "It stands to reason it would promote a better racial climate by hiring minorities."

The survey found 64.7% of respondents feel their companies should hire more black employees. And 39.9% said it's extremely or very important for companies to have formal procedures for recruiting and hiring minorities.

Recruitment programs "make sense in the face of the diversity that makes up our country," Ms. Graves said. "But I know the industry as a whole isn't doing anything significant in recruitment."

Many survey respondents agreed. Said one: "If there were more blacks included in the ad industry many years ago, the situation would be better today." □

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MasterCard balks at naming agency

Bankers to meet again with Ammirati, Fallon

By Gary Levin

MasterCard International last week unexpectedly delayed a decision to select Ammirati & Puris, New York, as its new agency, apparently because a 22-member committee of bankers refused to immediately approve the choice.

The credit card association had expected to announce Ammirati as the winner of the creative portion of its $60 million account. Instead, MasterCard dismissed incumbent Lintas:New York, further narrowing the review to Ammirati and Fallon McElligott, Minneapolis.

MasterCard now expects to make a final decision by monthend, after four of the bankers have met further with both agencies to learn more about their strategic vision for the bankcard.

At a meeting in San Francisco last week, MasterCard executives recommended to its U.S. business committee that Ammirati be awarded the account. But the committee, composed of credit card executives at leading banks, refused to issue the anticipated rubber stamp approval.

It remained unclear at press time whether the bankers sought to reverse the MasterCard executives' decision or simply wanted to take control of the review by meeting with both agencies themselves.

"It is now a two-horse race," said Peter S.P. Dimsey, president of MasterCard's U.S. region, in a statement, "and MasterCard is in the enviable position of having two strong agency finalists with reputations for outstanding brand-building advertising participating in the review process."

The winning agency's first campaign will break early next year, after the card's holiday MasterValues promotion ends.

The result of a separate review for the media buying portion of the account is also slated for the end of this month; the three agencies and possibly others, as well as independent media buying services, are participating.

James Desrosier, MasterCard's VP-advertising, denied the review has met any obstacles.

"There's nothing funky going on; the process has gone on flawlessly," he said. "We simply want to be able to take the time to evaluate the ideas fully so we can make the right long-term decision."

Mr. Desrosier denied that bankers were seeking a broader role in the decision process.

He said the four committee members who will meet again with the agencies—representing Citibank, First Chicago Corp., MBNA Corp. and Signet—attended preliminary agency presentations but haven't met with agencies since then.

The bureaucracy of the MasterCard organization, which reports to the bankers that own it and issue the card, has made the five-month-long pitch at times "chaotic," said one participant.

"The bankers are not happy with how the process has been managed, and the fact that they still can't agree on an agency at this point is indicative of what's going on over there," the agency executive said.

One executive said the initial choice of Ammirati was based on consumer research of campaigns developed by all three shops and on the client's assessment of each agency's strategic and analytical insights.

"There's nothing funky going on; the process has gone on flawlessly."

The executives were thought to have allied more with Ammirati's repuation for an elegant, copy-driven style than with Fallon's aggressive but whimsical approach.

Fallon is said to have pitched a campaign centered on satisfying consumer "wants and needs" with the credit card, themed "We have what you need." Ammirati offered work that promoted the card's functional "usefulness" in a variety of settings.

An early theme developed by Ammirati, reportedly "Today's card," was later modified, a change that led it to prevail in the minds of MasterCard executives.

The selection of a new agency represents the latest phase in an overhaul aimed at contemporizing MasterCard's stodgy image. MasterCard introduced a sleeker logo last year and in 1990 added the MasterValues program.

"Visa is very aggressive and has an effective marketing campaign, Discover has been steadily going along, and Discover and MasterCard are fighting for the same turf; they're both going after the middle market," said James Daly, editor of *Credit Card News*, an industry newsletter. "The ad [agency] review is undoubtedly another component of the strategy to give MasterCard a fresher face." □

Melanie Wells contributed to this story.

Discounter Phar-Mor hobbled by scandal

By Kate Fitzgerald

The days of phenomenal growth and tough-as-nails dealing may be over for Phar-Mor.

The deep-discount drug chain, which helped rewrite the rules in package-goods retailing, is planning immediate advertising cutbacks and tabling expansion after last week's revelations of a costly embezzlement scandal.

"We're in the process of developing a new business plan. We're looking at making [advertising] changes," said Carol Robinson, VP-public relations for Phar-Mor, which has 300 stores in 33 states.

"We're in the process of developing a new business plan."

Saffer Advertising, Toronto, won Phar-Mor's $12 million broadcast account a year ago; the company's estimated $10 million print account is handled in-house.

The company bought time during NBC's Summer Olympics telecast in several regional markets with an Olympic-themed campaign tagged "You get a great deal at Phar-Mor because Phar-Mor only buys great deals."

A print campaign already planned for August will continue through the month, but the company won't commit to any ad plans beyond that.

Saffer said all media planning is on hold, but it hasn't been notified of any changes in its relationship with Phar-Mor.

Phar-Mor founder David Shapira, president-ceo of the $3 billion company, said last week co-founder and Vice Chairman Michael I. Monus, 44, and Chief Financial Officer Patrick Finn, 34, had been fired for alleged embezzlement.

The FBI and the U.S. attorney in Ohio are investigating charges that Messrs. Monus and Finn diverted at least $10 million in company funds to private sporting interests, including the 5-year-old World Basketball League.

Privately held Phar-Mor said it will take a $350 million charge to cover those losses. It will also dismiss 100 employees immediately to offset costs and has told some suppliers to halt orders.

Before the embezzlement scandal, Phar-Mor said its plans were to double its stores to 600 nationwide over the next five years; those plans are on hold, and the company won't comment further.

Phar-Mor's fumble may cripple its leadership of the deep-discount sector.

"Regardless of Phar-Mor's problems, all deep discounters are going to be facing tougher competition from now on. The supermarkets were caught off-guard by the deep discounters at first, but they're fighting back now, putting the pressure back on the likes of Phar-Mor," said Christie Hunt, an associate with retail consultancy Willard Bishop Consulting. □

Bush ads

(Continued from Page 1)

vember Co., headed by Martin Puris, president of Ammirati & Puris, New York. Calls to the November Co. weren't returned.

Finally—and officially—the campaign said the commercials "needed to be revised and corrected, and we did that before they aired."

But unofficially, the campaign, realizing the potential problem with using the seal, became "concerned whether that was appropriate. To be sure that there was no confusion, it was then done without the seal," a campaign official said.

The problem only added to criticism heaped on the spots. The November Co. includes only two creatives with extensive backgrounds in political advertising and consulting. The others, including Mr. Puris, are from major commercial agencies and have limited, if any, familiarity with producing political spots.

The next Bush-Quayle commercials aren't expected until after the convention, perhaps not until after Labor Day.

The mistake fueled speculation that personnel changes may be forthcoming, especially if Secretary of State Jim Baker assumes control of the campaign. Political insiders say Sig Rogich, a former adman from Las Vegas, Nev., who helped create campaign ads for President Reagan in 1984 and President Bush in 1988, would be installed by Mr. Baker. Mr. Rogich, currently U.S. ambassador to Iceland, didn't return a phone call last week, and a Bush-Quayle spokesman said he was unaware of any such planned changes. □

NBC

(Continued from Page 1)

presence was due to an incremental media buy GE made following its original deal with NBC.

"We increased it after our upfront buy. We made our initial purchase about two years ago, and we made an additional purchase this year," said Richard Costello, manager of corporate marketing communications for GE.

But Mr. Costello declined to specify how much money GE added to the deal or exactly when the buy was made. However, an executive at GE agency BBDO Worldwide, New York, said he was unaware of any last-minute incremental ad buy.

An executive at a competing network estimated GE was getting about half the ad time of NBC's top Olympic sponsor Coca-Cola USA, but Mr. Costello denied GE's commitment was anywhere near that large.

He said observers tracking GE commercials in certain markets, including New York, may have mistaken a large local Olympic buy on NBC-owned stations for network spots.

Through Aug. 4, with only five days remaining of the network's Olympic coverage, Mr. Costello estimated GE had aired 56 network TV spots and 91 local units on WNBC-TV in New York, for a total of 147 units.

"We deliberately, in New York, purchased a lot of weight, but I don't think we are even close to being one of the largest national advertisers in the Olympics," Mr. Costello said.

But even at only 56 network units (equaling 29 minutes of commercial time), GE would have been one of NBC's largest Olympic advertisers.

During the same period, NBC said Coca-Cola aired 92 spots (equaling 67 minutes, 45 seconds of commercial time).

At even half the rate of Coca-Cola's deal, GE's buy would be worth an estimated $23 million, said executives familiar with the value of such packages. Coca-Cola is estimated to have paid NBC $46 million for its Olympic buy.

That would be an exceptionally large buy for a two-week media flight by GE, which spent less than $18 million on all of the Big 3 networks last year and only $6 million on NBC.

Although it's common for marketers to increase their ad budgets in Olympic years, an executive at a competing network noted that GE spent only $10 million on NBC's coverage of the 1988 Summer Games in Seoul, South Korea.

Agency and network executives speculated the deal was more a matter of internal corporate accounting than a true media buy. If the deal was a conventional media buy handled through its agency, BBDO would know about it, because the shop is paid commissions on its clients' media buys.

"Obviously, it's coming out of one pocket and being put into another pocket," said an agency media executive of another NBC Olympic advertiser. The executive said there might be a less than altruistic motive behind the deal.

"They may have done it to bolster NBC's books to make them look more profitable for a sale," said the executive, referring to endless speculation that GE plans to divest itself of NBC in the near future.

GE and NBC executives have steadfastly denied rumors of an impending sale.

Projections for NBC's 1992 Olympic losses range from about $40 million to more than $100 million.

"The real story is that NBC didn't really sell out the Olympics. All they did was shift dollars around," said an agency executive for another Olympic advertiser. "Everybody knew going in that they were going to put some extra GE spots in there to fill it up, but I don't think they're bookkeeping it at bargain prices, because that would screw all their other advertisers. But clearly, they played bookkeeping games to fill up their time."

Said GE's Mr. Costello: "As far as I'm aware, I'm buying market pricing." □

Gold, silver and bronze ad deals

Marketer	Commercial units July 25-Aug. 4	Est. cost of buy
Coca-Cola USA:	92 spots (67 minutes, 45 secs)	$46 million
General Electric:	56 spots (29 minutes)	$12 million-plus
Reebok:	39 spots (19 minutes, 30 secs)	$12 million

Source: Commercial units for General Electric and Coca-Cola spots from NBC; Reebok from Advertising Age analysis of NBC's coverage. Prices from industry estimates.